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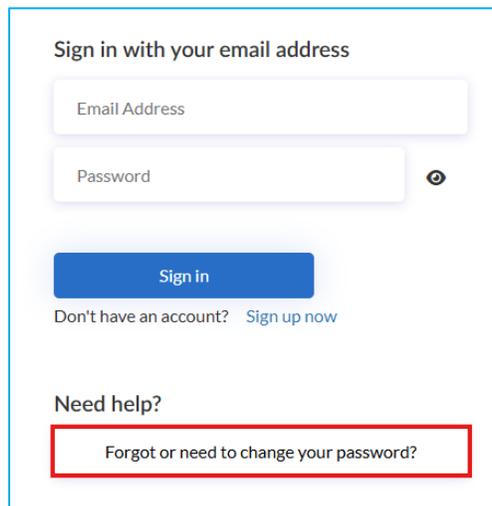
This guide explains how to navigate and use the [POOL360](https://pool360.com) website, an eCommerce system for both customers and employees. Please contact support@pool360.com with any questions.

ACCOUNT CREATION AND LOGGING IN

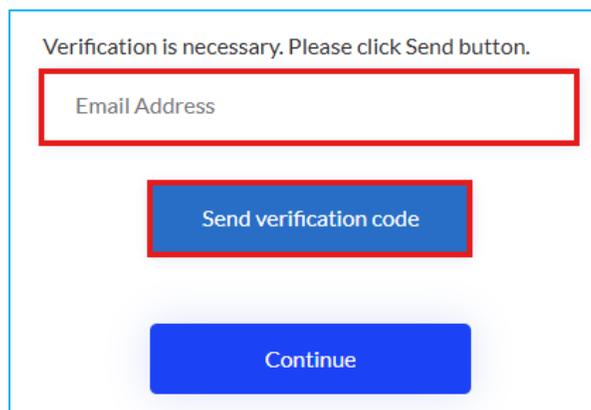
To begin, navigate to [POOL360.com](https://pool360.com). Users who have received a login from an administrator should follow the instructions in **Received a Login From an Administrator**, otherwise, follow the instructions in **Creating a POOL360 Account**. Once a user has created their account, proceed with **Logging Into POOL360**.

RECEIVED A LOGIN FROM AN ADMINISTRATOR

When an Account Administrator creates a login for a new POOL360 user on the same account, they enter that new user's email address and name and assign a user role. After the Account Administrator clicks **Create User**, an email containing a link to POOL360 is auto-generated and sent to that new user's email address. The user will click the link and click **Forgot or need to change your password?**



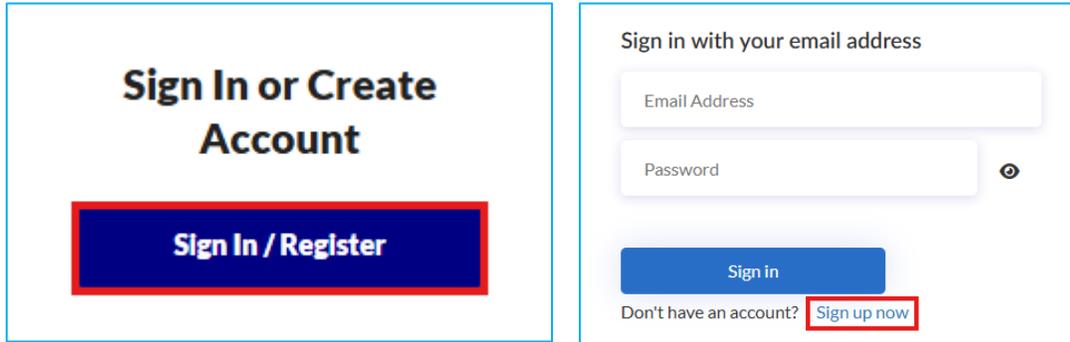
A new window will open, and they will enter their **Email Address**. Then, they will click the **Send verification code** button.



Once verified, they will be prompted to create their new password.

CREATING A POOL360 ACCOUNT.

New POOL360 users will click **Log In**, **Sign in/Register**, and finally **Sign up now**.



Sign In or Create Account

Sign In / Register

Sign in with your email address

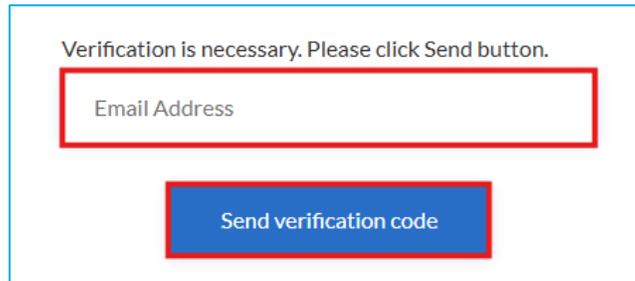
Email Address

Password

Sign in

Don't have an account? **Sign up now**

The system will ensure that the email address provided is valid and that the user can access it as part of the security process. Click the **Send verification Code** button.

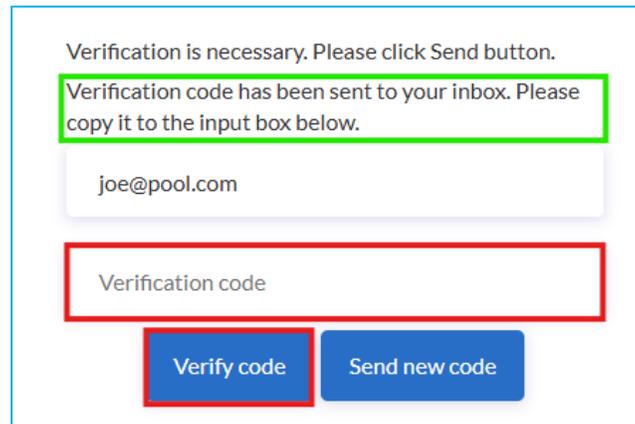


Verification is necessary. Please click Send button.

Email Address

Send verification code

The user will receive an email from Microsoft B2C on behalf of POOLCORP containing a 6-digit verification code to enter in the **Verification code** field. Click **Verify code**.



Verification is necessary. Please click Send button.

Verification code has been sent to your inbox. Please copy it to the input box below.

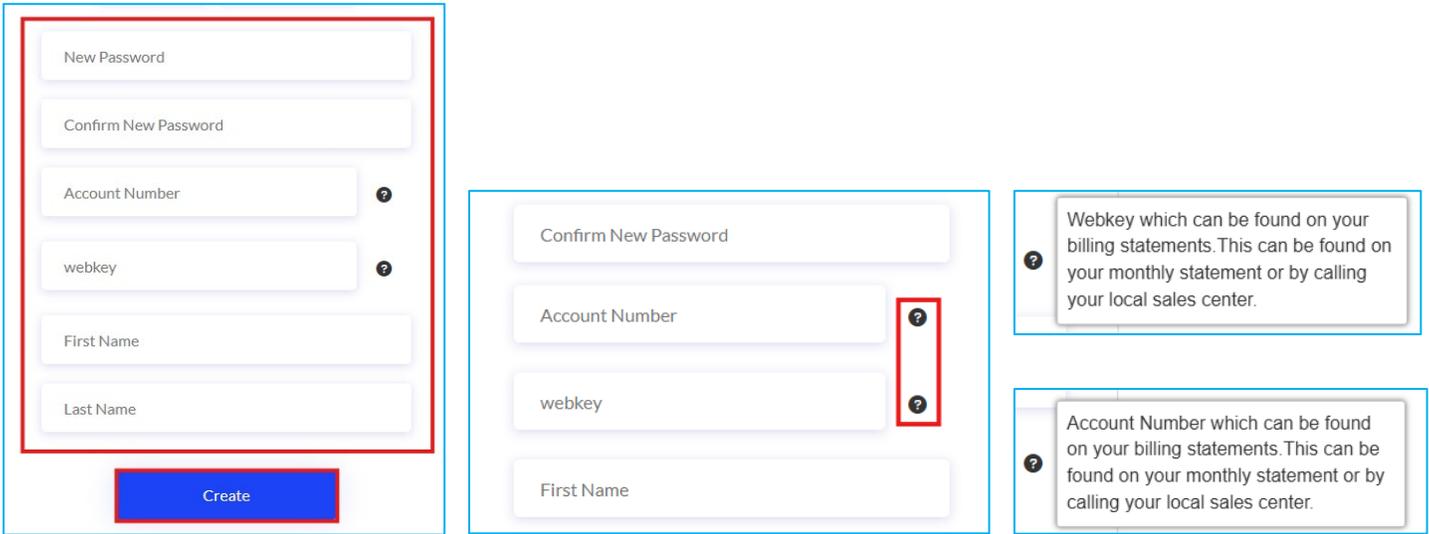
joe@pool.com

Verification code

Verify code Send new code

NOTE: *The verification code is only valid for a couple of minutes.*

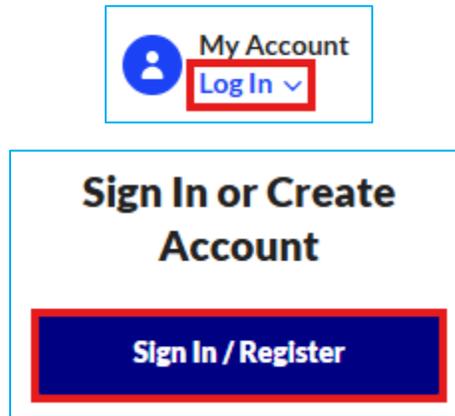
Once the email address has been verified, enter the requested information: **New Password, Confirm New Password, Account Number, webkey, First Name, and Last Name.** Account numbers and webkeys can be found on the monthly statement or by contacting a branch.



The registration form consists of two main sections. The left section contains input fields for 'New Password', 'Confirm New Password', 'Account Number', 'webkey', 'First Name', and 'Last Name', with a blue 'Create' button below. The right section contains input fields for 'Confirm New Password', 'Account Number', 'webkey', and 'First Name'. Red boxes highlight the 'New Password' and 'Confirm New Password' fields in the left section, and the 'Account Number' and 'webkey' fields in the right section. Callout boxes provide instructions: 'Webkey which can be found on your billing statements. This can be found on your monthly statement or by calling your local sales center.' and 'Account Number which can be found on your billing statements. This can be found on your monthly statement or by calling your local sales center.'

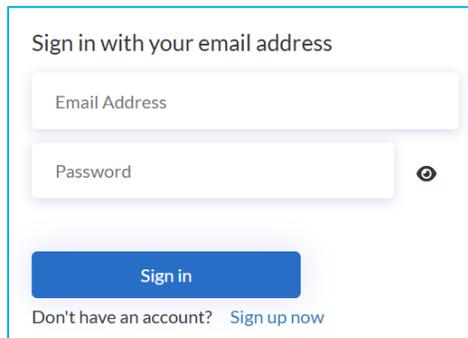
LOGGING INTO POOL360

To log into POOL360, navigate to pool360.com, click **Log In**, and then **Sign In / Register**.



This block shows the navigation and sign-in options. At the top is a 'My Account' button with a user icon and a 'Log In' dropdown menu. Below it is a large 'Sign In or Create Account' button, and at the bottom is a blue 'Sign In / Register' button.

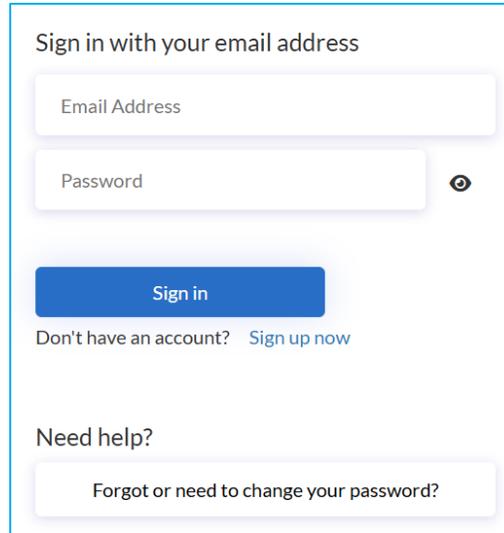
Enter the account **Email Address** and **Password**, and click **Sign in**.



The sign-in form is titled 'Sign in with your email address'. It contains two input fields: 'Email Address' and 'Password'. Below the fields is a blue 'Sign in' button. At the bottom, there is a link: 'Don't have an account? [Sign up now](#)'.

CHANGING/FORGOTTEN PASSWORD

If a user forgets their account password or wishes to change it, click the **Forgot or need to change your password?** button on the login page.



The screenshot shows a login form titled "Sign in with your email address". It contains two input fields: "Email Address" and "Password". Below the "Password" field is a blue "Sign in" button. Underneath the button, there is a link "Don't have an account? Sign up now". At the bottom of the form, there is a "Need help?" section with a button labeled "Forgot or need to change your password?".

Enter the **Email Address** and click **Send verification code**.

An email containing a verification code will be sent to the provided email. Enter it in the **Verification code** field and click **Verify code**. Alternatively, request a new code by clicking **Send new code**. Once verified, click **Continue**.

Enter a **New Password**, **Confirm New Password**, and click **Continue** to set the new password.

SELECTING AN ACCOUNT

After logging in, the system opens to the **Select Account** page. From here, set the account's options with the **Select Bill To**, **Recipient Address**, and **How do you want your items?** selections. When finished, click **Continue**.

Before paying any invoices, users must ensure that the Bill To set on the account is connected to the invoices they wish to pay.

For this example, the customer's Bill To address is in Frisco, Texas, but their receiving address is in New Orleans, Louisiana. The account is set up for store pick up in New Orleans.

NOTE: To pick up an order at a different branch, change the branch before adding items to the cart.

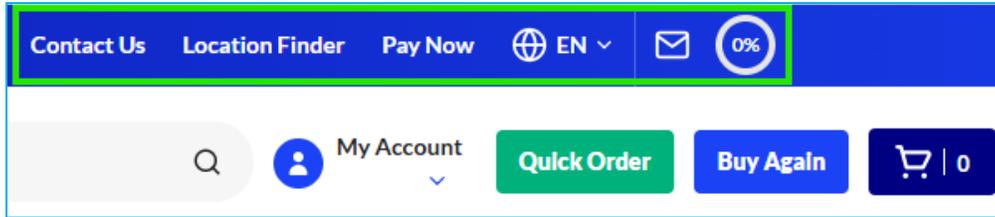
Users with multiple account numbers do not need multiple user logins, but they will need to email support@pool360.com with the email address used for their POOL360 user login and a list of account numbers to associate them with the same account.

Once support has completed the request, click **Your Sales Center** to select and **Set as Sales Center**.

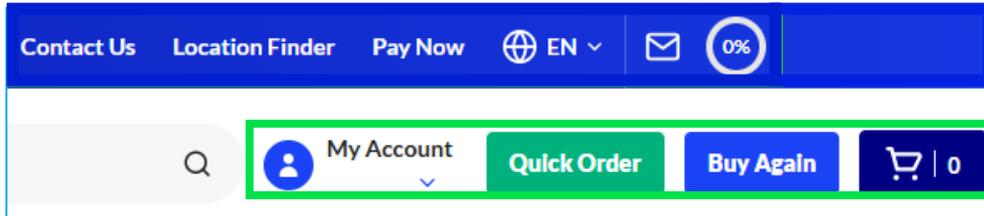
HOMEPAGE OVERVIEW

ACCOUNT MENUS

At the top of the page are **Contact Us**, **Location Finder**, **Pay Now**, the *language selector (globe icon)*, **Dashboard** (*envelope icon*), and a display of the percentage of credit used on the current account.

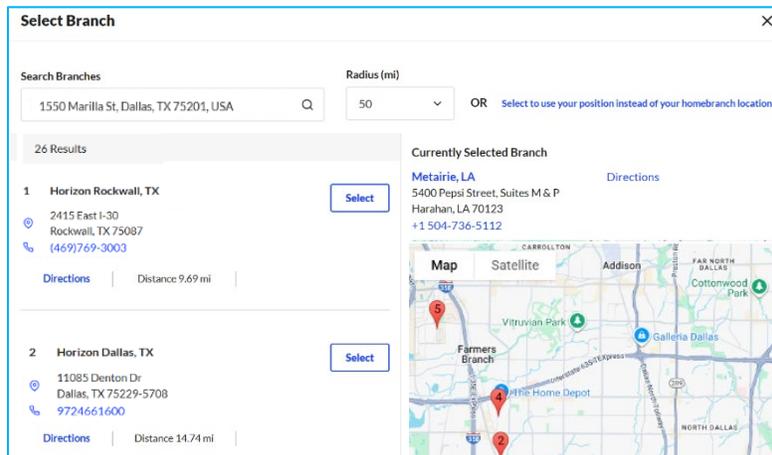


Beneath, there is the **My Account** drop-down, along with **Quick Order**, **Buy Again**, and the *shopping cart*.



Contact Us brings up a contact form for POOL360 support, along with a list of contact information for global POOLCORP Support Departments.

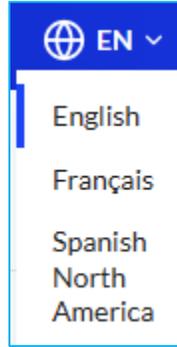
The **Branch Finder** allows the user to search for branches by postal code, city, location, or radius.



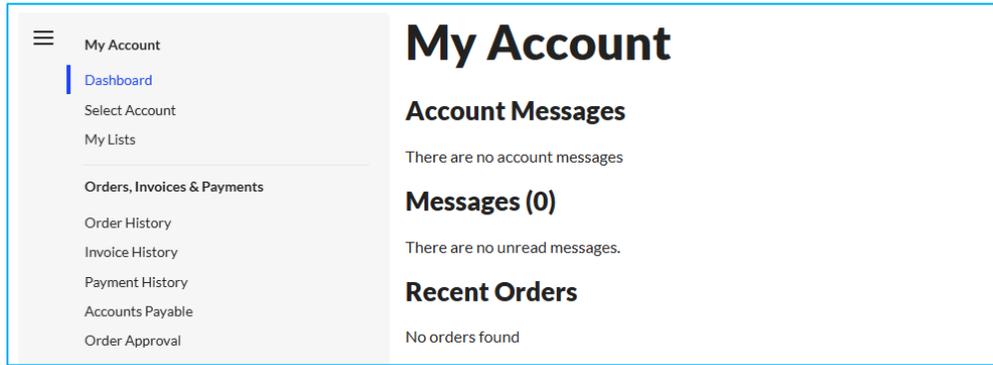
Pay Now will bring up the **Invoice History** page, where users can pay their invoices by clicking the **Invoice Payment** drop-down.



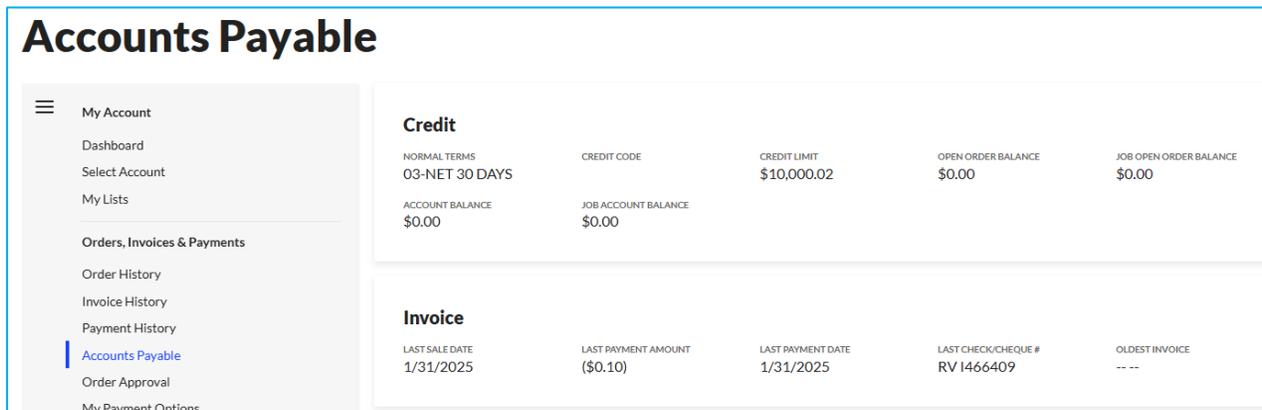
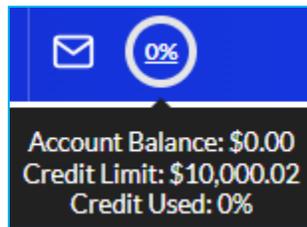
The **language selector** displays initials indicating the language in use. Clicking this drop-down menu allows the user to select the language used on the POOL360 site.



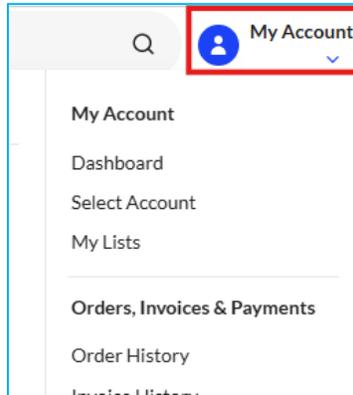
Clicking the **envelope icon** will bring the user to their **My Account Dashboard**.



Hovering over the **percentage icon** will display a snapshot of **Account Balance**, **Credit Limit**, and **Credit Used**. Clicking this icon will open the **Accounts Payable** page.



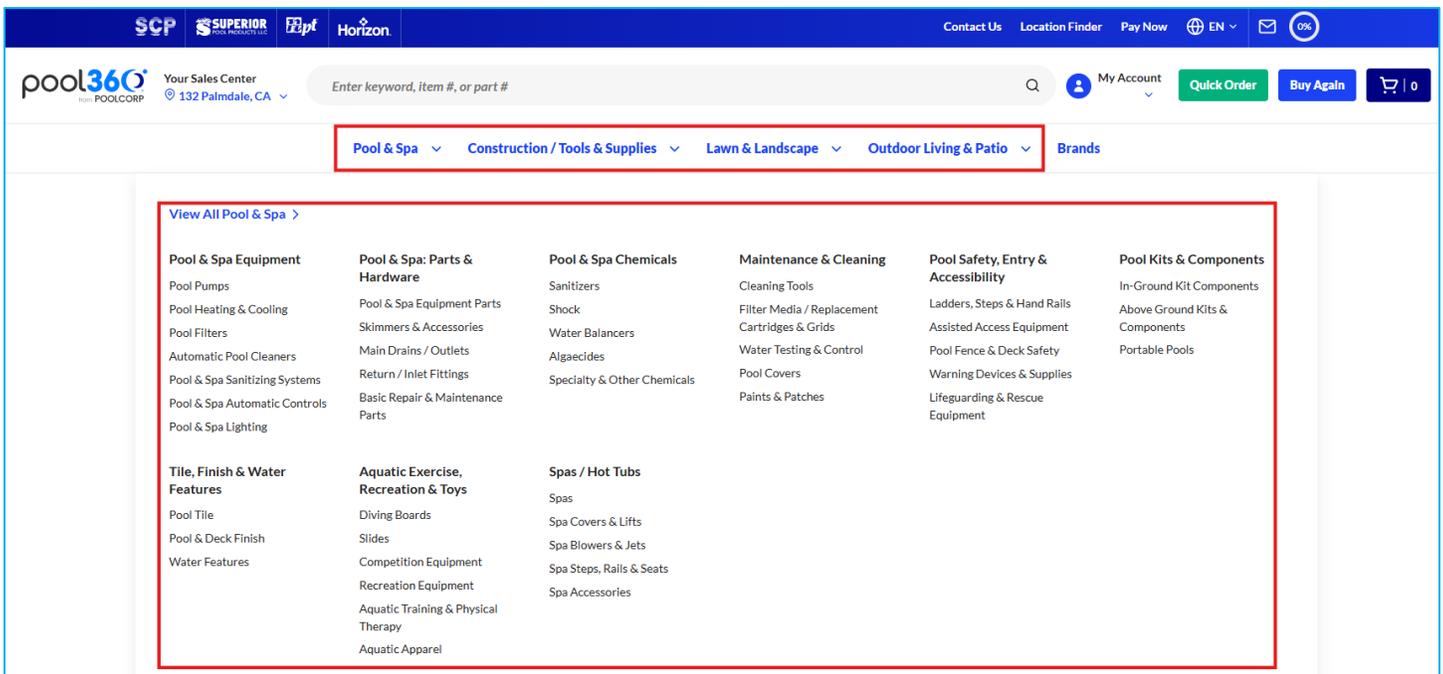
The **My Account** dropdown menu is the single menu option with all other pages listed. These pages will be demonstrated throughout the guide.



The buttons next to the **My Account** drop-down link to the **Quick Order** page, **Buy Again** page, and the **shopping cart**, respectively. These pages will be described in more detail throughout the guide.

PRODUCTS AND BRANDS MENUS

To shop by product categories, use the drop-down menus located in the top-center of the page. Users can drill down to more specific product categories to find what they need.



For example, click the following: Pool and Spa Products link > Pool and Spa Equipment link or image > Pool Pumps link or image > Pumps. Each of these categories has a more granular drill-down, and it helps drive the customer to the products they are looking for.

Shop by Category [See all](#)

Pool and Spa

**Construction Products
Tools and Supplies**

Lawn and Landscape

Outdoor Living & Patio

Pool & Spa Equipment

- [Pool Pumps](#)
- [Pool Heating & Cooling](#)
- [Pool Filters](#)
- [Automatic Pool Cleaners](#)
- [Pool & Spa Sanitizing Systems](#)
- [Pool & Spa Automatic Controls](#)
- [Pool & Spa Lighting](#)

Pool & Spa: Parts & Hardware

- [Pool & Spa Equipment Parts](#)
- [Skimmers & Accessories](#)
- [Main Drains / Outlets](#)
- [Return / Inlet Fittings](#)
- [Basic Repair & Maintenance Parts](#)

Pool & Spa Chemicals

- [Sanitizers](#)
- [Shock](#)
- [Water Balancers](#)
- [Algaecides](#)
- [Specialty & Other Chemicals](#)

To shop by brands, click **Brands** and toggle the letter or number menus to see brands beginning with that character.

The screenshot shows the Pool360 website navigation. The 'Brands' menu is open, and the 'A' character menu is selected. The 'Aladdin' brand is highlighted in a red box. Other brands listed include Alderon, AlgaeShield, All Pure, All Season Spa Covers, Alliance Gator, Alliance Outdoor Lighting, Allied Innovations, Appleton, Applied Blochemists, Aqua Basics, Aqua Creek, Aqua Genie, Aqua Leisure, Aqua Products, Aqua Rex, Aqua-trol, Aquatrols, Aquatron, Aquaworx, AquaZone, aqualonics, AQURON, and Arborbrace.

SEARCHING POOL360

POOL360 offers many options to help users find the products they are looking for. This section will go over the available features.

POOL360 UNLOCKED

POOL360 Unlocked makes the entirety of the POOL360 inventory available to all customers, regardless of where they are shopping from or where the products are stocked. This means, for example, a customer who usually works out of an Arizona branch but knows they will be in Louisiana for a job can create a Pick Up order for a branch in Louisiana, or a customer can have an item available only in a particular branch shipped to their store if needed.

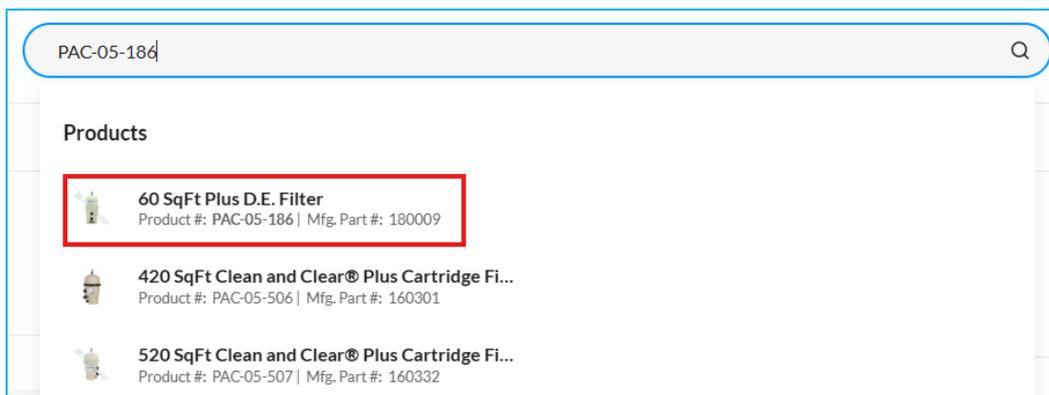
When a user chooses **Pick Up** under the **How do you want your items?** menu, they may see a prompt from their browser requesting permission to use the user's location. If the user grants the browser permission, POOL360 will geolocate the user and center the default location results on those near them. The user is free to choose ANY branch to show different results, but this will help them see what products are available nearby first.

SEARCH FIELD

Search for products using the **search field**. Clicking into the search field displays the search history for the ten most recent searches. To search, enter a keyword, an item number, a part number, or a product description.

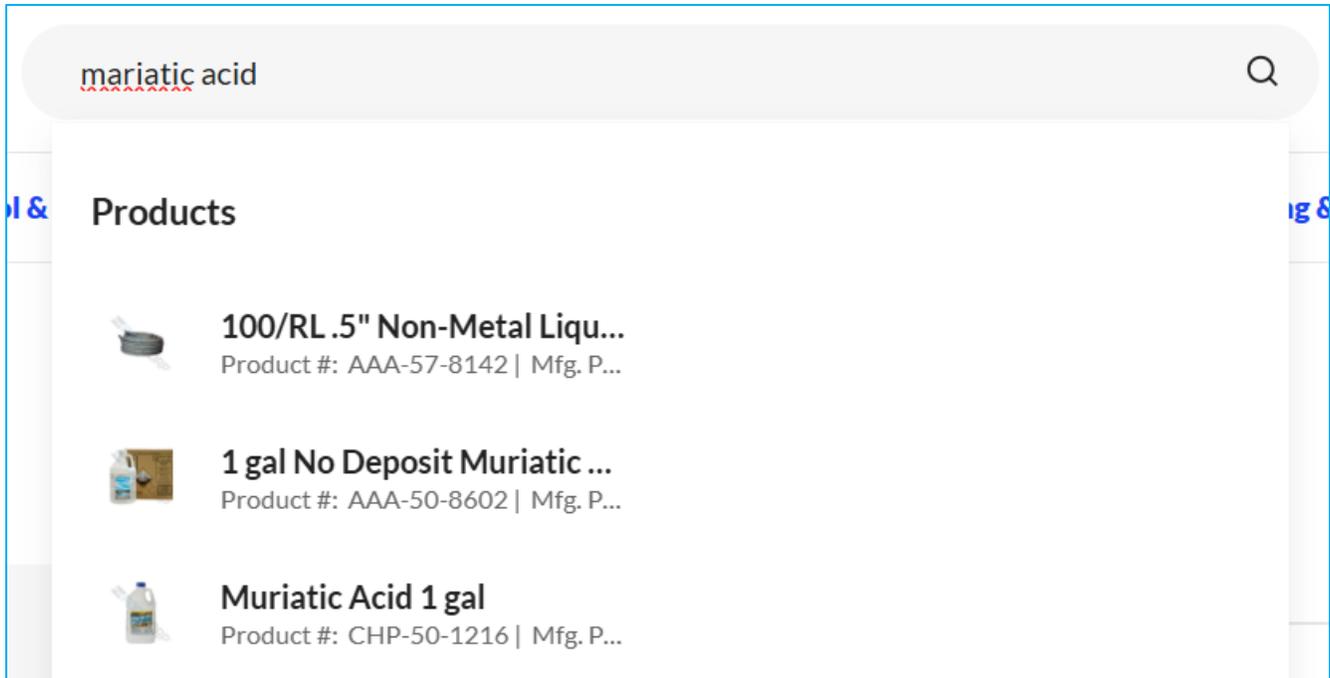


For this example, the search was for a filter. The system provides product suggestions with thumbnail images as the product name is typed. Click a search result to open its product details page.



TIP: Enter a full product number in the search bar and press enter to go directly to the product page.

POOL360's search can also show results when a term is misspelled. In this example, a search was run for muriatic acid, but the word was misspelled. POOL360 auto-corrected the entered text and listed the products with the correct spellings.



SEARCH RESULTS

In this example, several results appeared for filters. Search **Filters** appear on the left.

Filters

Search Within Results

Enter Keywords

Branch Available

Branch Stocked

Categories

Brands

Wholegood/Part/Kit

Application

Family

Commercial, Residential, or Professional

Product Type

Channel

Material

Color

SubBrand

Standards Approvals

Horsepower

Green or Energy Efficient Product

Finish

10414 Items for filter

Sort by Best Match



PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301
132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

1

For Pickup

[Add to List](#)



JANDY
60 SqFt DEV Series D.E. Filter
Product #: TLD-05-126
Mfg. Part #: DEV60
132 Palmdale, CA:
In Stock (3 available)
*Stocking Item

1

For Pickup

[Add to List](#)



PENTAIR
60 SqFt Plus D.E. Filter
Product #: PAC-05-186
Mfg. Part #: 180009
132 Palmdale, CA:
In Stock (19 available)
*Stocking Item

1

For Pickup

[Add to List](#)



AQUASTAR POOL PRODUCTS
Pipeline Filter for 35,000 gal Pool
Product #: API-05-0001
Mfg. Part #: PLF35000



PENTAIR
System:3® Air Bleed Filter
Product #: SWQ-051-8314
Mfg. Part #: WCB-126Z



PENTAIR
48 SqFt Plus D.E. Filter
Product #: PAC-05-185
Mfg. Part #: 180008

Notice the product is labeled **In Stock**. Click the **information (i)** icon next to **In Stock** to view more detailed information. Other locations that may also have the product in stock are also listed. This shows that the product is typically stocked at that branch.



PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301

132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

1

Branch Inventory ✕

Branch	QTY	Stocking Item
501A - SPP Canoga Park, CA	21	✓ Yes
37 - Van Nuys, CA	67	✓ Yes
196 - West L.A., CA	31	✓ Yes
500A - SPP Van Nuys, CA	7	✓ Yes
C9 - Santa Clarita, CA	9	✓ Yes
516A - SPP Newbury Park, CA	17	✓ Yes
543A - SPP Oxnard, CA	4	✓ Yes
71 - Burbank, CA	14	✓ Yes
132 - Palmdale, CA	11	✓ Yes
31 - San Dimas, CA	29	✓ Yes
570A - SPP Santa Barbara, CA	9	✓ Yes
517A - SPP Anaheim, CA	18	✓ Yes

Updated January 12, 2026

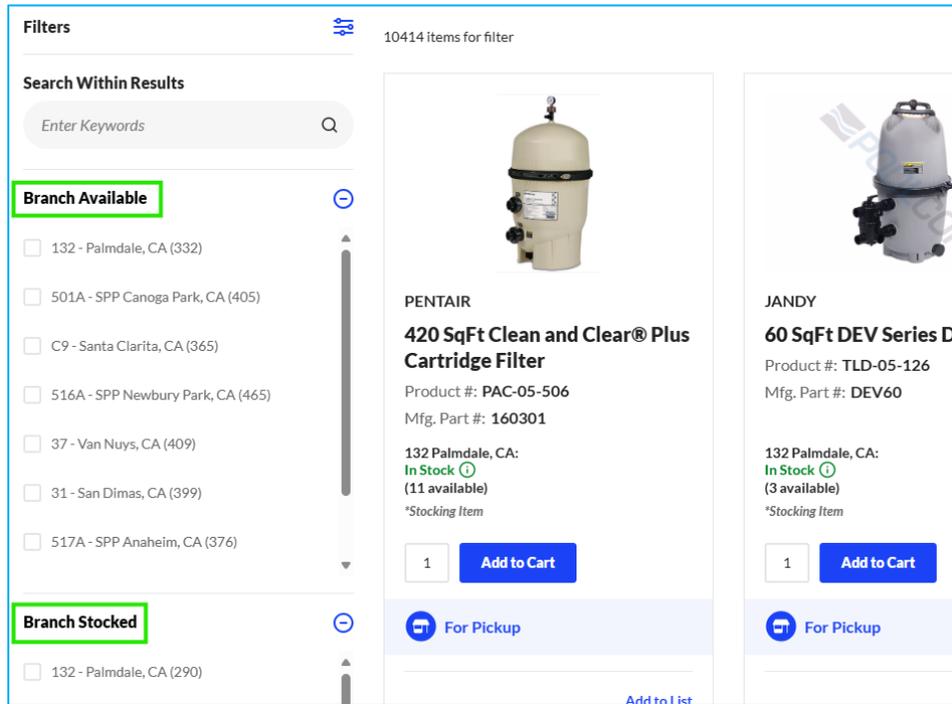
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Please contact support@pool360.com with any questions.

By choosing **Pick Up Now** as the **Fulfillment Method** and selecting a **Pickup Branch**, whether a product is branch-stocked can be determined. If a product is to be delivered, the system will look at the home branch for stocked items. Whether the items are stocked or not, they can be purchased and added to the cart.

FILTERS

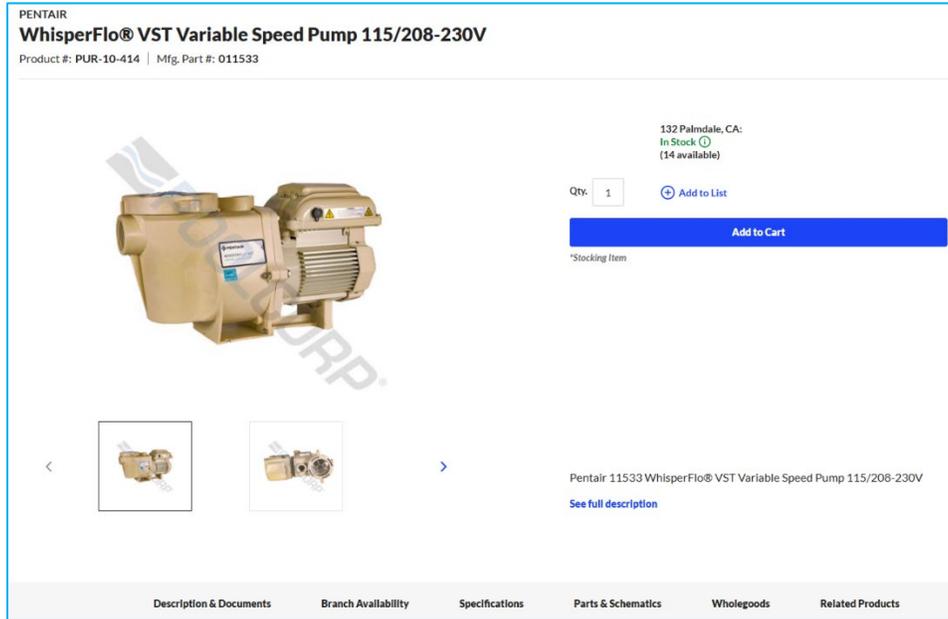
Use the Filter menu to refine searches further. The example shows many results; by selecting Palmdale, CA, in the **Branch Available** filter, only products available in the Palmdale branch will display.



NOTE: The **Branch Available** and **Branch Stocked** filters will only display what is available at the branch selected in the **Your Sales Center** drop-down.

PRODUCT PAGES

In this example, the product searched was **PUR-10-414**. Since the **Product Number** was searched, the system skips the search results page and displays the product page. The product page contains basic product information, along with an image. Click the image to view it in better detail.



A basic product description is toward the top, but a retail marketing description is in the middle of the page, providing additional details. Any documents, such as **Install Guides**, **SDS Sheets**, **Ops Manuals**, and **Tech Manuals**, are listed under the **Documents** heading.

Description	Documents
<p>The WhisperFlo® VST Variable Speed Pool Pump is available now to keep pools running smoothly. This durable pump offers more power than SuperFlo® VST Pool Pump. And your energy bill will appreciate the upgrade, too.</p>	<ul style="list-style-type: none"> PUR-10-414-bro.pdf (Brochures) PUR-10-414-ig.pdf (InstallGuide)
Feature Bullets	
<ul style="list-style-type: none">• Variable speed technology for great energy savings• Superior, drop-in replacement for existing Pentair WhisperFlo pumps• Totally enclosed fan-cooled (TEFC) motor performs with top durability• User-friendly programming lets you pick the best speed for your pool	

The page will display information such as branch availability and stocking status, product specifications, and Proposition 65 warnings. It will also list any featured specifications available for the products.

Click the **Parts & Schematics** diagram to view more details. Scroll down to view individual parts in the **Legend**. Links to parts pages are provided. Parts can be added to the cart without visiting the product page.

Parts & Schematics

Mfg #	Product #	Description	Notes	Availability	Price	Retail Price
1	357199Z	PUR-101-3370	Cam & Ramp® Plastic Clamp	132 Palmdale, CA: In Stock (3 available) *Stocking Item		1 <input type="button" value="Add"/>
2	357151Z	PAC-101-4960	WhisperFlo® Clear Strainer Cover After 11/1998	132 Palmdale, CA: In Stock (3 available) *Stocking Item		1 <input type="button" value="Add"/>
2	357156	PAC-101-0108	Chemical Resistant Blue Tint Lid	132 Palmdale, CA: Out of Stock (Available at other locations) <small>*Non-Stocking Item: additional charges may apply.</small>		1 <input type="button" value="Add"/>

Continuing to scroll down, **Accessories** that are frequently purchased with this item are listed.

Accessories Frequently Purchased With This Item



25' Automation Cable Wiring Kit
Product #: PAC-101-0140

132 Palmdale, CA:
In Stock (5 available)
*Stocking Item

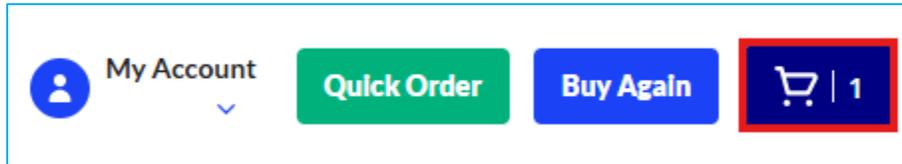
1
[Add to List](#)

If the specific product the customer is looking for is not available, product substitutes will be listed in the **Legend**.

SHOPPING: USING THE CART AND CHECKOUT

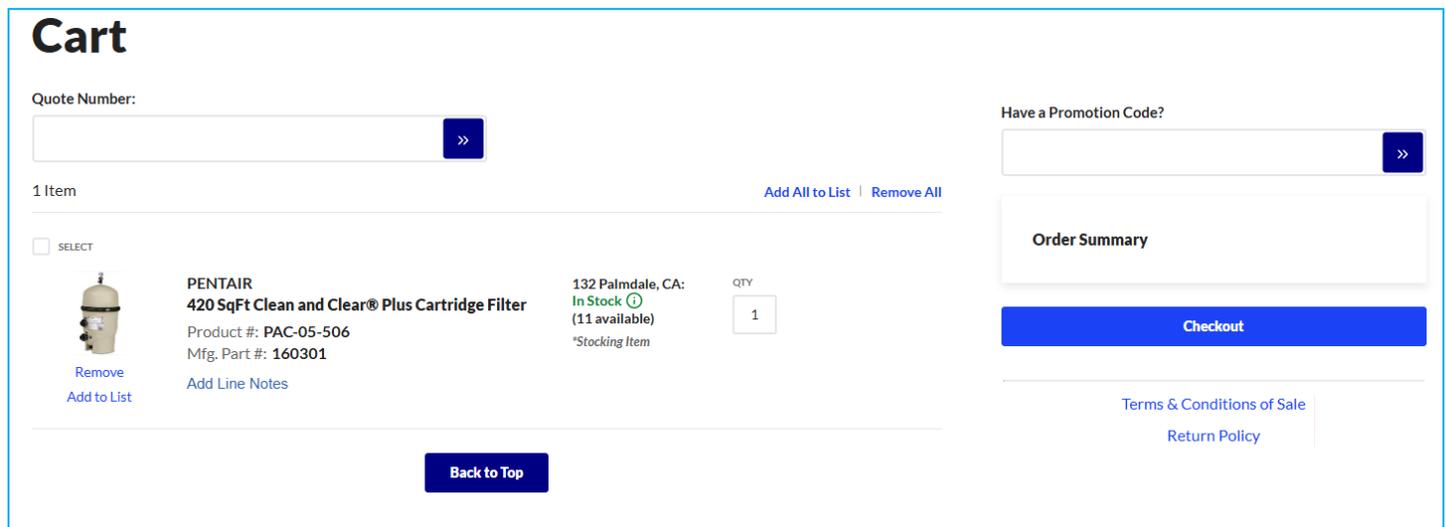
CART

To access the shopping cart, click the **cart icon**. The following example shows that one (1) item is waiting to be purchased.



The shopping cart page opens.

NOTE: To see what products are in the cart without navigating away from the current page, hover over the **cart icon** to display a snapshot cart view.



Cart

Quote Number: >>

Have a Promotion Code? >>

1 Item [Add All to List](#) | [Remove All](#)

SELECT

	PENTAIR 420 SqFt Clean and Clear® Plus Cartridge Filter Product #: PAC-05-506 Mfg. Part #: 160301 Remove Add to List	132 Palmdale, CA: In Stock ⓘ (11 available) <small>*Stocking Item</small>	QTY <input type="text" value="1"/>
-------------------------------------------------------------------------------------	-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------	---------------------------------------

[Back to Top](#)

Order Summary

[Checkout](#)

[Terms & Conditions of Sale](#)
[Return Policy](#)

The **Quote Number** field allows customers to enter their quote number provided by branch representatives. After entering the quote number, click the blue **double arrows** button, and the system will load products and quantities based on the quote.

Cart

Quote Number:

1 Item

SELECT



PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301

[Remove](#)
[Add to List](#)

[Add Line Notes](#)

[Back to Top](#)

To add a line-item note to a product in the cart, click **Add Line Notes**, enter the note, and click out of the field. The system automatically saves the note. To hide them, click **Hide Line Notes**.

NOTE: *Line Notes will follow the product through delivery and will be included on the delivery slip.*

SELECT



PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301

[Remove](#)
[Add to List](#)

[Add Line Notes](#)

PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301

132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

QTY:

[Hide Line Notes](#)

Enter a note here and click out of the box to save it. Notes will follow an item from Place Order through Delivery. If this item is added to a list, the note will follow it to the list.



PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301

[Remove](#)
[Add to List](#)

[Hide Line Notes](#)

132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

QTY:

Enter a note here and click out of the box to save it. Notes will follow an item from Place Order through Delivery. If this item is added to a list, the note will follow it to the list.

To update the quantity of the products to be purchased, edit the **Qty**.

SELECT



PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301

[Remove](#)
[Add to List](#)

[Add Line Notes](#)

132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

QTY:

To remove an item from the cart, click **Remove** under the product thumbnail. To remove all items from the cart, click **Remove All**. To remove multiple items from the cart, check the **Select** box next to each product to be removed, and click **Remove Selected**.

1 Item

SELECT

PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301
[Remove](#)
[Add to List](#)

132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

QTY: 1

[Add All to List](#) [Remove All](#)

1 Item

SELECT

PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301
[Remove](#)
[Add to List](#)

132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

QTY: 1

[Remove Selected](#) [Add All to List](#) [Remove All](#)

Products in the cart can also be added to lists. Click **Add to List** under a product thumbnail to add an individual product to a list, or click **Add All to List** to add all products in the cart to a list.

Cart

Quote Number: [»](#)

1 Item [Add All to List](#) [Remove All](#)

SELECT

PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
Product #: PAC-05-506
Mfg. Part #: 160301
[Remove](#)
[Add to List](#)

132 Palmdale, CA:
In Stock (11 available)
*Stocking Item

QTY: 1

[Show Line Notes](#)

To use a promotion code on the order, enter it in the **Have a Promotion Code?** field and click the blue **double arrows** to apply it.

Have a Promotion Code?

[»](#)

Order Summary

[Checkout](#)

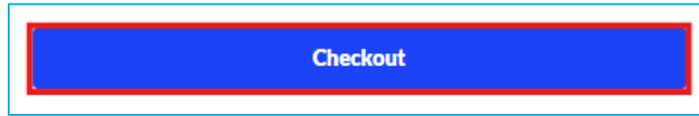
To view the **Terms & Conditions of Sale** or the **Return Policy**, click the links beneath the **Checkout** button.

[Checkout](#)

[Terms & Conditions of Sale](#)

[Return Policy](#)

When ready, click **Checkout** to begin the checkout process.



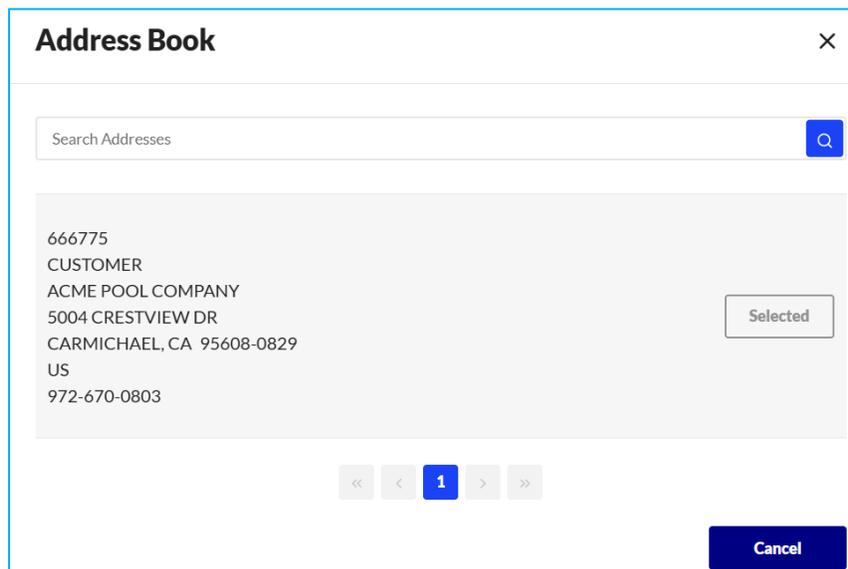
NOTE: Any items marked as **Backordered** may be purchased, but will be delayed.

CHECKOUT

The **Checkout** page is where fulfillment methods, billing addresses, and shipping addresses can be selected.

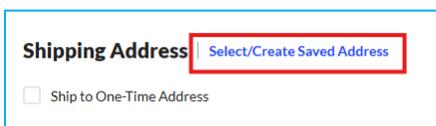
To begin, select either **Ship to Address** or **Pick Up** for **How do you want your items?**

For either option, the **Billing Address** is where the order will be billed to. To change it, click **Select Saved Address** to open the **Address Book** and select a different address.



For orders where **Ship to Address** is selected, the order will be shipped to the address displayed. To change this, do one of the following:

- **Select Saved Address:** Click **Select/Create Saved Address**, and click **Select** next to the desired address.



Address Book ✕

Create New Address

G
(Taxable)

Select

New Orleans, LA 70115
US

Edit

- Create Saved Address:** To add a new address and save it for future shipments, click **Select/Create Saved Address**, click **Create New Address**, and enter the address details. All fields marked with an asterisk (*) are required. When finished, click **Save**.

Address Book ✕

Create New Address

Create New Address ✕

First Name

Last Name

Company Name *

Attention

Country *
United States ▼

Address 1 *
Type to search ▼

Address 2

Address 3

City *

State *
Select State ▼

Postal Code *

Phone *

Fax

Email

Cancel
Save

- **Ship to One-Time Address:** To ship to an address without adding it to the address book, check the **Ship to One-Time Address** box and fill out the address details. To add it to the address book, check **Save to Address Book**.

Shipping Address | [Select/Create Saved Address](#)

Ship to One-Time Address

First Name

Email

Save to Address Book

For orders where **Pick Up** is selected, the order will be picked up at the displayed **Pick Up Branch**. To change this, click **Find Branch**. In the **Select Pick Up Branch** window, use the **Search Locations** field to find the desired branch, then click **Select**.

Select Pick Up Branch ✕

Search Locations

11 Results Miles Kilometers

1 31 -San Dimas, CA Select

685 Terrace Dr
San Dimas, CA 91773
6263037921

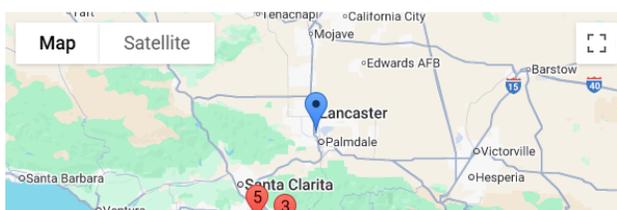
[Directions](#) | Distance 1225 mi

Currently Selected Location

Palmdale, CA [Directions](#)

40242 La Quinta Lane #104
Palmdale, CA 93551
6617289445

Distance 1242 mi



To add order notes, enter them in the **Add Order Notes—Gate Codes, Shipping Instructions, etc. box**. These notes will be associated with the order during the delivery process.

Add Order Notes - Gate Codes, Shipping Instructions, etc

THIS IS A TEST ORDER ONLY,** DO NOT PROCESS **

Review the **Order Summary**, and click **Continue** when ready.

Order Summary

Subtotal	\$1,185.25
Shipping & Handling	TBD
Tax	\$133.34
Total	\$1,318.59

Continue

CHECKOUT – REVIEW & SUBMIT

The **Checkout – Review & Submit** page is where billing, fulfillment, and payment details are finalized before the order is placed.

Checkout - Review & Submit

[Back](#) [Place Order](#)

All prices shown exclude applicable Sales Tax and Shipping Charges; and, all prices shown are estimates only and may be more or less than the actual price paid. Prices may vary at different sales center locations. Prices are subject to change without notice. Thank you for your Continued Patronage.

Billing Address Edit	Pick Up Branch Edit	Order Summary
FRISCO, TX 75035-7301 US	132 - Palmdale, CA 40242 La Quinta Lane #104 Palmdale, CA 93551 6617289445	

Subtotal	\$1,185.25
Shipping & Handling	TBD
Tax	\$133.34
Total	\$1,318.59

[Place Order](#)

Confirm that the **Billing Address** is correct or click **Edit** to change it.

Confirm that the **Shipping Address** or **Pick-up Branch** (whichever applies to the order) is correct or click **Edit** to change it.

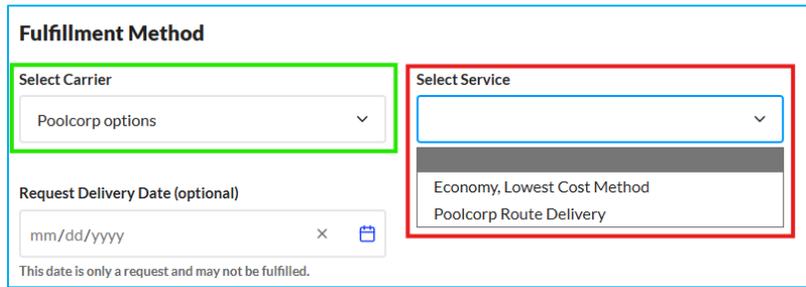
The options available under **Fulfillment Method** will be different depending on the chosen method on the previous page.

If **Ship to Address** was selected, choose **Poolcorp** options or **UPS** from the **Select Carrier** drop-down menu.

Fulfillment Method

Select Carrier	Select Service
<input type="text" value="Poolcorp options"/> v	<input type="text" value=""/> v
<input type="text" value="Poolcorp options"/>	Select a Service Option
<input type="text" value="UPS"/>	

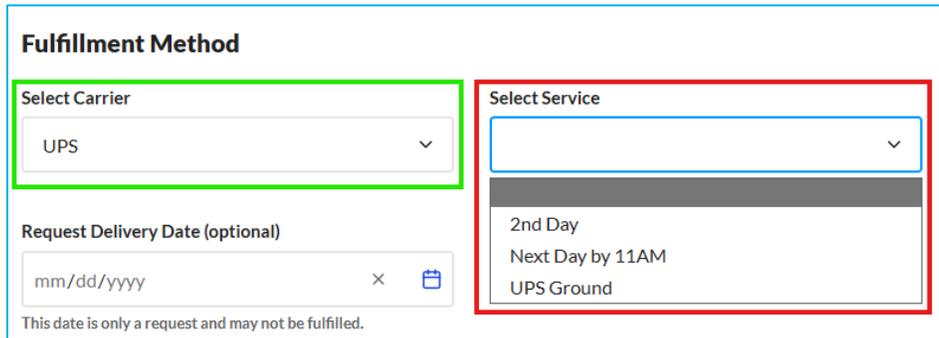
When **Poolcorp Options** is selected, use the **Select Service** dropdown menu to choose from the following options:



The screenshot shows the 'Fulfillment Method' section. The 'Select Carrier' dropdown is highlighted with a green border and contains 'Poolcorp options'. The 'Select Service' dropdown is highlighted with a red border and shows a list of options: 'Economy, Lowest Cost Method' and 'Poolcorp Route Delivery'. Below these is a 'Request Delivery Date (optional)' field with a date input and a calendar icon. A note at the bottom states: 'This date is only a request and may not be fulfilled.'

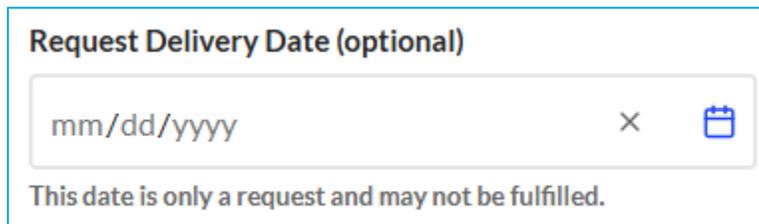
- **Economy Lowest Cost Method** – This allows, at the branch’s discretion, to find the cheapest and quickest service option for the customer.
- **Poolcorp Route Delivery** – This is the delivery of products using POOLCORP trucks and routing. The price can vary by branch.

When **UPS** is selected, choose from **2nd Day**, **Next Day by 11 AM**, or **UPS Ground** shipping options.



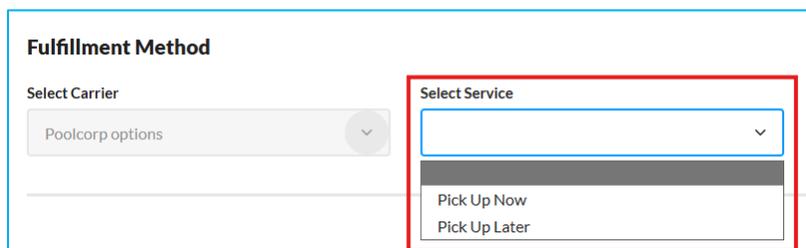
The screenshot shows the 'Fulfillment Method' section. The 'Select Carrier' dropdown is highlighted with a green border and contains 'UPS'. The 'Select Service' dropdown is highlighted with a red border and shows a list of options: '2nd Day', 'Next Day by 11AM', and 'UPS Ground'. Below these is a 'Request Delivery Date (optional)' field with a date input and a calendar icon. A note at the bottom states: 'This date is only a request and may not be fulfilled.'

Optionally, select a date for **Request Delivery Date (optional)**.



The screenshot shows a close-up of the 'Request Delivery Date (optional)' field. It features a text input with the placeholder 'mm/dd/yyyy', a clear button (X), and a calendar icon. Below the input is a note: 'This date is only a request and may not be fulfilled.'

For **Pick Up** orders, **Select Carrier** is not applicable and is grayed-out. From the **Select Service** drop-down, choose **Pick Up Now** or **Pick Up Later**.



The screenshot shows the 'Fulfillment Method' section. The 'Select Carrier' dropdown is grayed-out and contains 'Poolcorp options'. The 'Select Service' dropdown is highlighted with a red border and shows a list of options: 'Pick Up Now' and 'Pick Up Later'.

- **Pick Up Now:** Items in the order will be pulled within an hour and made available from the Priority lane at the branch or brought out to the customer’s vehicle.

- **Pick Up Later:** The branch will put a hold on the items in the order, but they will not be pulled until the customer arrives at the branch. Optionally, select a date for **Request Pick Up Date (optional)**.

Fulfillment Method

Select Carrier: Poolcorp options

Select Service: **Pick Up Later**

Request Pick Up Date (optional): 09/17/2025 06:06 PM

Please be aware that this date is a request and cannot be guaranteed.

For all fulfillment methods, select a **Payment Method** and enter a **PO Number** (if applicable) under **Payment Details**.

Payment Details

Payment Method *: Terms

PO Number: [Empty]

Select Payment Method: Terms

Card On File

EDIT BRANCH FOR ALL ITEMS

Select Branch

An additional Payment Method, Pay Now, is available exclusively for Pick Up Now orders.

Payment Details

Payment Method *: Terms

Select Payment Method: Terms, Pay Now, Card On File

To edit the branch the products are ordered from, either update an individual product using the **Edit Branch** drop-down next to it, or update all items at once by selecting an option under **Edit Branch For All Items**.

Your Item (1)

PENTAIR
420 SqFt Clean and Clear® Plus Cartridge Filter
 Product #: PAC-05-506
 Mfg. Part #: 160301

LINE NOTES
 Enter a note here and click out of the box to save it. Notes will follow an item from Place Order through Delivery. If this item is added to a list, the note will follow it to the list.

EDIT BRANCH FOR ALL ITEMS

Select Branch ▼

\$1,185.25 / EA	<small>QTY</small>	<small>SUBTOTAL</small>
In Stock ⓘ	1	\$1,185.25

EDIT BRANCH

 132 - Palmdale, CA (11) ▼

NOTE: *If an order contains products from different branches, a different invoice will be created for each branch.*

View the **Order Summary** to see the **Subtotal**, **Tax**, and **Total** amount that will be billed for the order at this time. Note that **Shipping & Handling** is listed as **TBD** – this is determined by the branch(es) fulfilling the order and will be billed at a later time. Reach out to the branches fulfilling the order for more details.

Order Summary

Subtotal	\$1,185.25
Shipping & Handling	TBD
Tax	\$118.53
Total	\$1,303.78

Place Order

Once satisfied with the details of the order, click **Place Order**. This sends the order directly into Prelude.

Order Summary

Subtotal	\$1,185.25
Shipping & Handling	TBD
Tax	\$118.53
Total	\$1,303.78

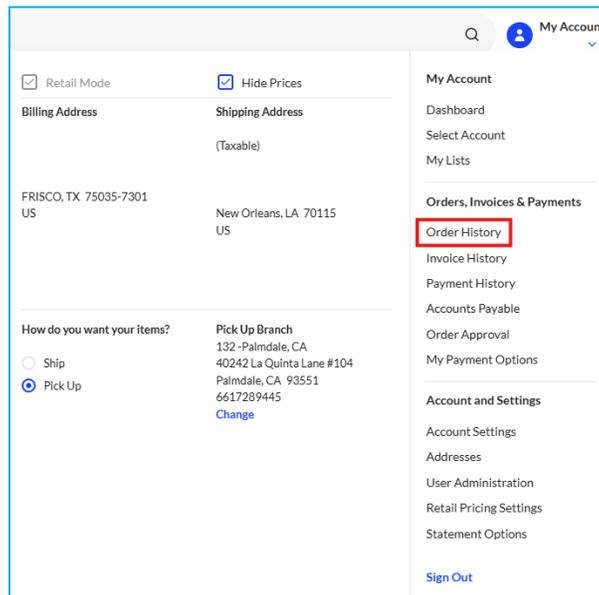
Place Order

The confirmation page will display the **Order Number**, the **Account** the order was placed under, **Ship To** or **Pick Up** information, and the item numbers of the products ordered.

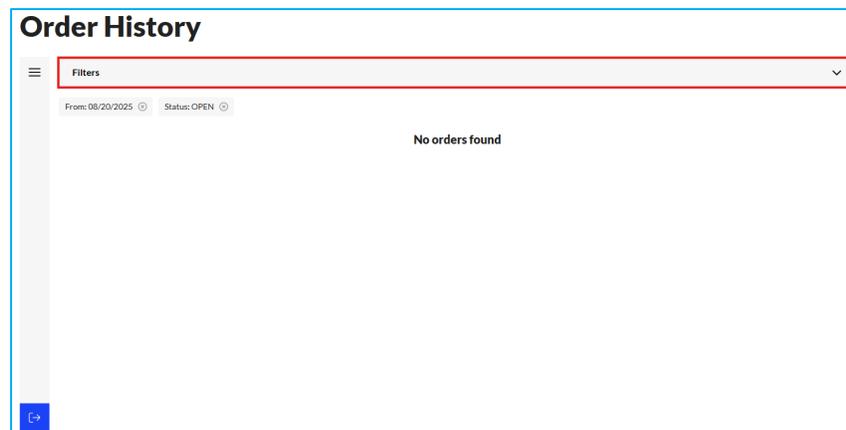
USING THE MY ACCOUNT DROP-DOWN MENU

ORDER AND INVOICE HISTORY AND DETAILS

To confirm that an order went through, or to view order status, click **Order History** from the **My Account** drop-down menu.



Initially, **No orders found** may display. This is because the system looks for the most recent open order to display quickly in **Order History**. Click the down arrow for the **Filters** menu to change the dates and the status to prompt the system to return results for more orders.



The **Date From** and **Date To** filters can be adjusted to look back by days or months. The **Order Status** defaults to search for **Open** orders, but can also search for **Invoiced** orders. **PO Number**, **Order Number**, and even **Order Total** can be filtered. Make any necessary changes to the filters and click the **Apply** button.

Order History

Filters

PO # Order # Ship To

Status Date From Date To

No orders found

In the following example, if the customer searches for an order that has been invoiced, either the **Order** or the **Invoice** link can be clicked to view.

6 orders [Download Back Order Report](#)

Order	Invoice	Date	PO	Job	Status
UA002751	UA002487	09/04/2024	TEST		Invoiced
UA002750	UA002486	09/04/2024	TEST		Invoiced
NSS82849	NS476416	02/18/2024	TEST P360 PAYMENTS		Invoiced
NSS82848	NS476415	02/18/2024	POOL360 TEST PAYMENTS		Invoiced
NSS82833	NS476398	02/16/2024	POOL360 TEST PAYMENTS		Invoiced
NSS82832	NS476397	02/16/2024	TEST P360 PAYMENTS		Invoiced

<< < 1 > >>

For information about backorders, click **Download Back Order Report**.



The **Order Details** page displays **Billing Address**, **Shipping Information**, and other information about the order. Click **Reorder** to add everything in the order to the cart.

Order #NS582833 [Print Order](#)

Order Date 2/16/2024	Status Invoiced	Invoice Number NS476398
Terms 03 - NET 30 DAYS	PO Number POOL360 TEST PAYMENTS	Reorder

Order Notes
THIS IS A TEST ORDER ONLY** DO NOT PROCESS**

Billing Information

Billing Address
FRISCO, TX 75035-7301

Shipping Information

Shipping Address FRISCO, TX 75035-7301	Fulfillment Method WILL CALL PICKUP	Date Requested 2/16/2024
--------------------------------------------------	-----------------------------------------------	------------------------------------

Your Item (1)

 WESTLAKE PIPE & FITTINGS 1" White Slip x Slip SCH40 Coupling Product #: LAS-56-4078 Mfg. Part #: 429010BC	QTY ORDERED 1	QTY SHIPPED 1	QTY BACKORDER 0
---------------------------------------------------------------------------------------------------------------------------	-------------------------	-------------------------	---------------------------

BRANCH: 525A - SPP Rancho Cordova, CA

Next, if an order was invoiced, click the **Invoice Details** link. Notice there is a link back to the order. No matter where in the system, there is a link back to the other, whether in the **Invoice** or **Order** view.

Order #NS582833 [Print Order](#)

Order Date 2/16/2024	Status Invoiced	Invoice Number NS476398
Terms 03 - NET 30 DAYS	PO Number POOL360 TEST PAYMENTS	Reorder

Order Notes

Another way to view Invoices is by accessing the **My Account** dropdown menu and clicking **Invoice History**.

My Account

- Retail Mode
- Hide Prices

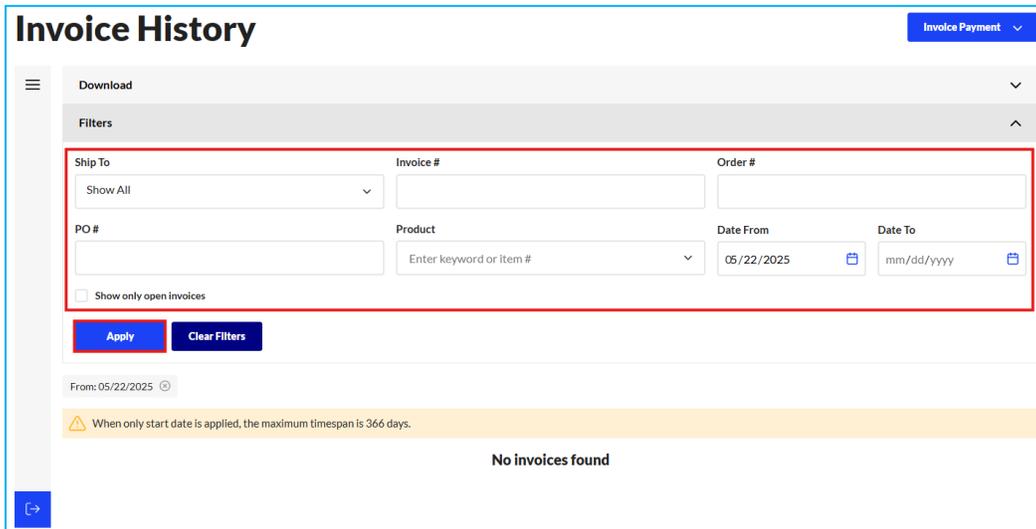
Billing Address FRISCO, TX 75035-7301 US	Shipping Address (Taxable) New Orleans, LA 70115 US
-------------------------------------------------------	---------------------------------------------------------------------

How do you want your items?
 Ship
 Pick Up

Pick Up Branch
132 - Palmdale, CA
40242 La Quinta Lane #104
Palmdale, CA 93551
6617289445
[Change](#)

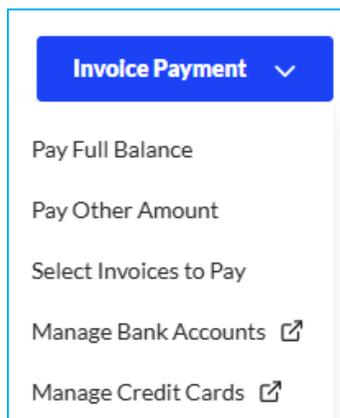
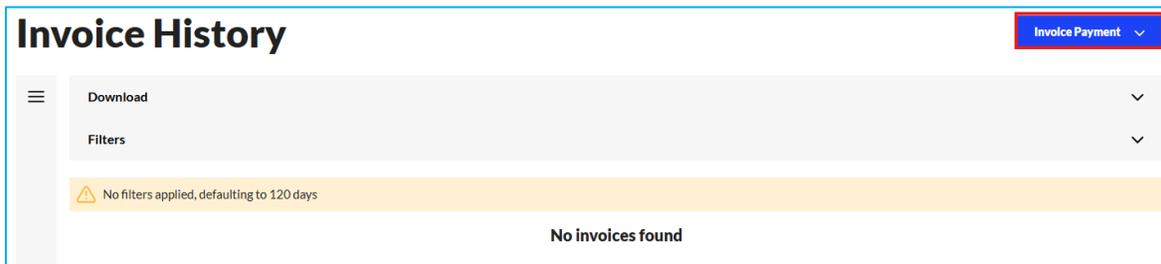
- My Account
 - Dashboard
 - Select Account
 - My Lists
- Orders, Invoices & Payments
 - Order History
 - Invoice History**
 - Payment History
 - Accounts Payable
 - Order Approval
 - My Payment Options
- Account and Settings
 - Account Settings
 - Addresses
 - User Administration
 - Retail Pricing Settings
 - Statement Options
- Sign Out

Click the down arrow for the **Filters** menu to change the dates, prompting the system to return results for more invoices. Other fields that can be filtered are **Ship To**, **Invoice #**, **Order #**, and the option to **Show only open invoices**. Click the **Apply** button.



Just like in **Order History**, if the customer searches for an order that has been invoiced, either the **Order** link or the **Invoice** link can be clicked to view it.

Customers who have credit card tokens on file or ACH set up with POOL360 Pay can open the **Invoice Payment** drop-down and select **Pay Full Balance**, **Pay Other Amount**, or **Select Invoices to Pay** to pay their invoices. Customers will use **Manage Payment Accounts** to make changes to their POOL360 Pay, logging in with their POOL360 Pay credentials.



Customers can opt in to receive monthly statements. To manage statement options, navigate to **Statement Options** from the **My Account** drop-down. From the **Statement Option** drop-down, choose **Opt In** or **Opt Out**. Then enter and confirm an email address, agree to the terms and conditions, and click **Submit**.

If opting in, the submission will be reflected in Prelude.

Statement Options

By selecting the OPT IN option below and by entering the email address for the person you authorize to receive the monthly statement electronically, you consent that we may provide you with your ACCOUNT RECONCILIATION (monthly) statement relating to that Account in electronic format, and that we may discontinue sending paper ACCOUNT RECONCILIATION statements to you, unless and until you withdraw your consent by selecting the OPT OUT option below.

If more than one email address is needed, please enter each email address separated by a comma (no spaces).

Please be advised it may take up to one billing cycle to process your request.

Statement Option *

Select Statement Option

Email Address *

Confirm Email Address *

I agree to the [terms and conditions](#)

Submit

RETAIL PRICING, YOUR COST, TIER PRICING, AND GLOBAL MARGINS

When looking at product pages, dealer cost and **Retail Price** are displayed. A **Global Margin** is used to activate the **Retail Pricing**. **Tier Pricing** can also be used. Sometimes it makes more sense to set Retail Price at Cost Tiers, so, for example, anything from 1 cent to \$25 is a 35% margin, and so on. Additional rows can be added as needed, and the system will validate entries to make sure margins are not crossed. When all margins are entered, click the **Save All Settings** button. If a branch location is specified, these updates can be seen during the next search.

Retail Pricing Settings

Global Settings

Activate retail pricing

Margin/Markup

Markup

Margin

Margin/Markup (%)

25

Tier Pricing Settings

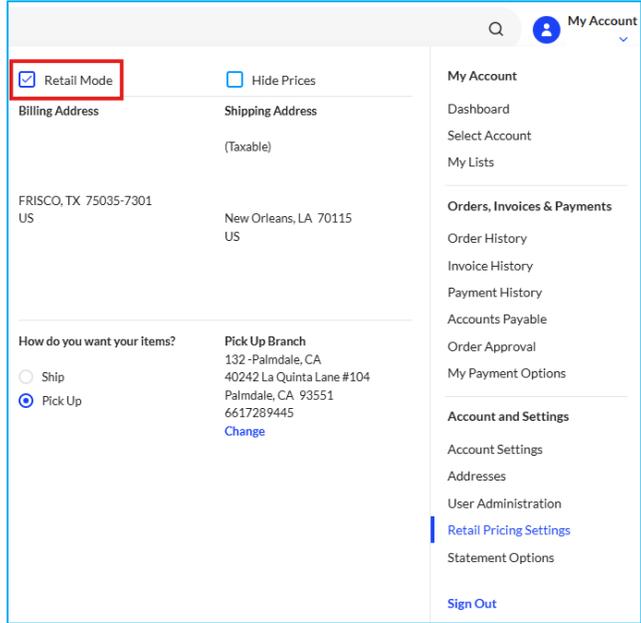
Activate tier pricing

From	To	Margin/Markup
1	2	20 %
2.01	3	25 %

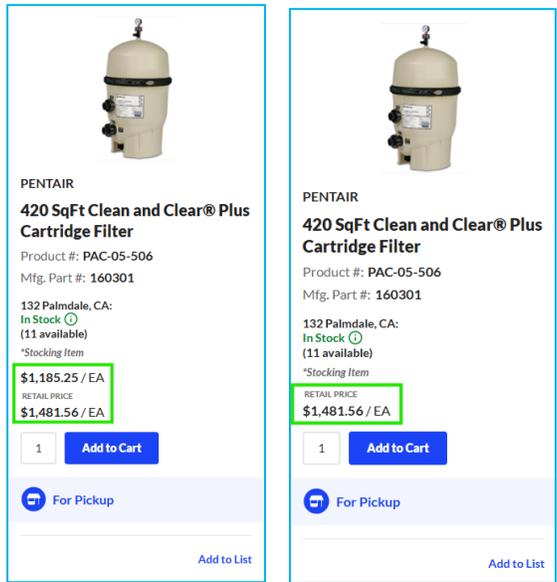
Insert Row

Save All Settings

If an employee wants to hide dealer cost and only show the **Retail Price**, they should click the **My Account** dropdown menu, then click the **Retail Mode** checkbox to enable it. The only price that can be seen is the **Retail Price**.

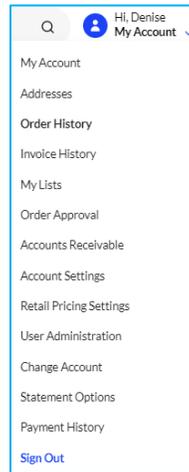


With the **Retail Mode** enabled, dealer costs will not be seen. Disable the **Retail Mode** checkbox to see dealer cost.

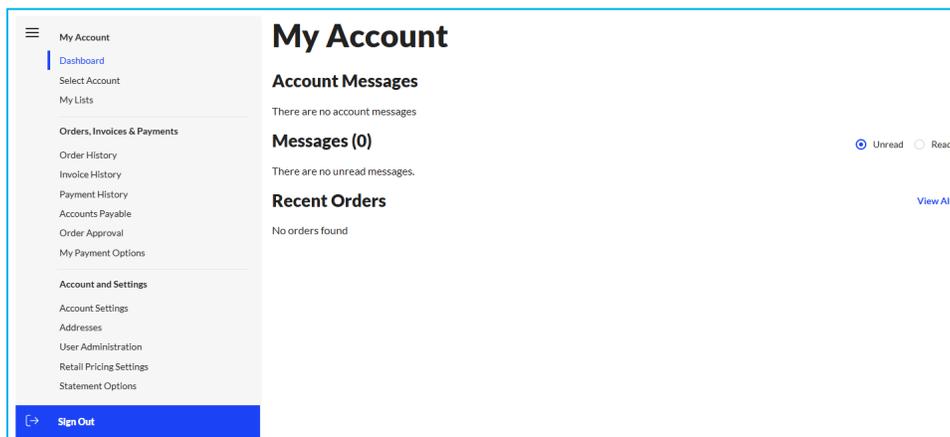


OTHER MY ACCOUNT MENU OPTIONS

Other menu options are available in the **My Account** drop-down menu.



The **My Account** page, also known as the **Dashboard**, is where messages that may be important to the customer will reside, such as global messages or credit messages sent about customer accounts. Customers can choose to filter their messages as **Read** or **Unread**.



Nothing can be updated on the **Addresses** page, as when the **Edit** links for **Billing Information** and **Shipping Information** are clicked, all the fields are grayed out and cannot be edited. Billing Information and Shipping Information addresses pull from Prelude.

NOTE: *Account Numbers will display as the first line of Billing and Shipping Information. All Account Numbers in this document have been cleansed for privacy purposes.*

Addresses

- My Account
 - Dashboard
 - Select Account
 - My Lists
- Orders, Invoices & Payments
 - Order History
 - Invoice History
 - Payment History
 - Accounts Payable
 - Order Approval
 - My Payment Options
- Account and Settings
 - Account Settings
 - Addresses**
 - User Administration
 - Retail Pricing Settings
 - Statement Options
- [Sign Out](#)

Billing Information

FRISCO, TX 75035-7301
US

Fax: 985-809-7304

Shipping Information

(Taxable)

New Orleans, LA 70115
US

Address Book

(Taxable)

New Orleans, LA 70115
US

(Taxable)

New Orleans, LA 70115
US

If customers want to do a one-time shipping address change at checkout, the address will not be saved; it is one-time use. Address management will be done through the ERP. This should help eliminate many of the orders that go into admin order hold. When this happens, something is missing or misspelled in the address, and the address goes into Prelude Address Validation.

Accounts Payable consists of Credit Limit, Credit Code, Current Balance, Last Sale Date, Last Payment Date, and Aging: Current, 1-30, 31-60, and Over 60 or Past Due.

Accounts Payable

- My Account
 - Dashboard
 - Select Account
 - My Lists
- Orders, Invoices & Payments
 - Order History
 - Invoice History
 - Payment History
 - Accounts Payable**
 - Order Approval
 - My Payment Options
- Account and Settings
 - Account Settings
 - Addresses
 - User Administration
 - Retail Pricing Settings
 - Statement Options
- [Sign Out](#)

Credit

NORMAL TERMS 03-NET 30 DAYS	CREDIT CODE	CREDIT LIMIT \$10,000.02	OPEN ORDER BALANCE \$0.00	JOB OPEN ORDER BALANCE \$0.00
ACCOUNT BALANCE \$0.00	JOB ACCOUNT BALANCE \$0.00			

Invoice

LAST SALE DATE 1/31/2025	LAST PAYMENT AMOUNT (\$0.10)	LAST PAYMENT DATE 1/31/2025	LAST CHECK/CHEQUE # RV 1466409	OLDEST INVOICE -- --
-----------------------------	---------------------------------	--------------------------------	-----------------------------------	-------------------------

Aging

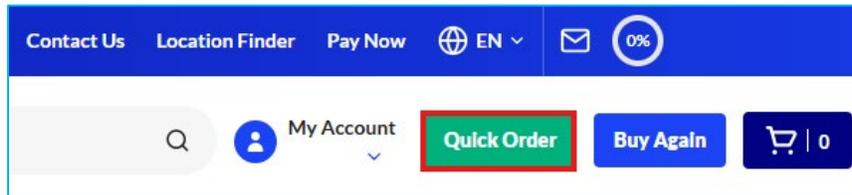
CURRENT \$0.00	1 - 30 PAST DUE \$0.00	31 - 60 PAST DUE \$0.00	OVER 60 PAST DUE \$0.00	TOTAL BALANCE \$0.00
FUTURE \$0.00				

Only three fields can be edited on the **Account Settings** page. The **First Name**, **Last Name**, and **Email** address fields can be changed. To be clear, the email address CAN be updated. Username CAN NOT be updated. When a user is migrated, an email address is used to verify their identity. If, for some reason, this email address is no longer valid and needs to be changed, it may be changed. Still, the Username will continue to be the email address that was initially used upon

signing up or when the account was migrated. If a password needs to be changed, it can be done by clicking **Change**, entering a new password, confirming it, and then clicking the **Save** button.

QUICK ORDER

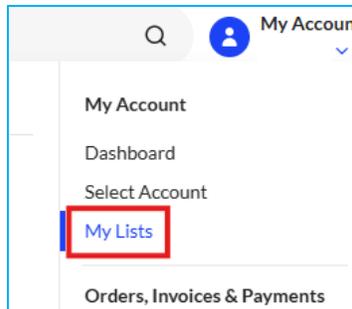
When Quote Numbers are provided to customers, they should click the **Quick Order** button.



When the Quick Order page opens, enter the number into the **Quote Number** field and click the blue **double arrows**. The Quick Order will populate. Another way to create a Quick Order is to search for a product from the Quick Order page. Once the desired products are found through the search and the correct Quantity is added, click the **Add to Order** button. Items added to the Quick Order can be added to the Cart or a list.

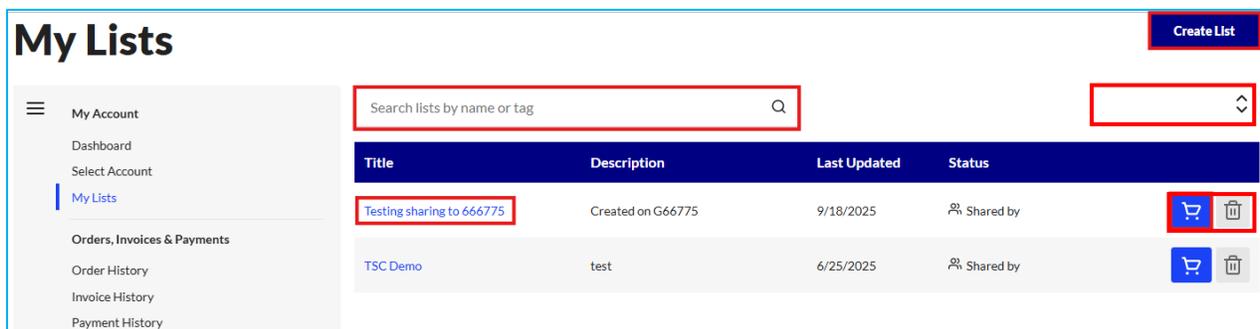
LISTS

Another menu option available in the **My Account** dropdown menu is **My Lists**.



MY LISTS

The **My Lists** page allows users to view and manage their lists.



- **Create List:** Opens the **Create List** prompt. Enter a **List Name** and an optional **Description** and click **Create List**. Alternatively, click **Cancel** to go back without creating a list.

NOTE: *To make searching for lists easier, give them descriptive names.*

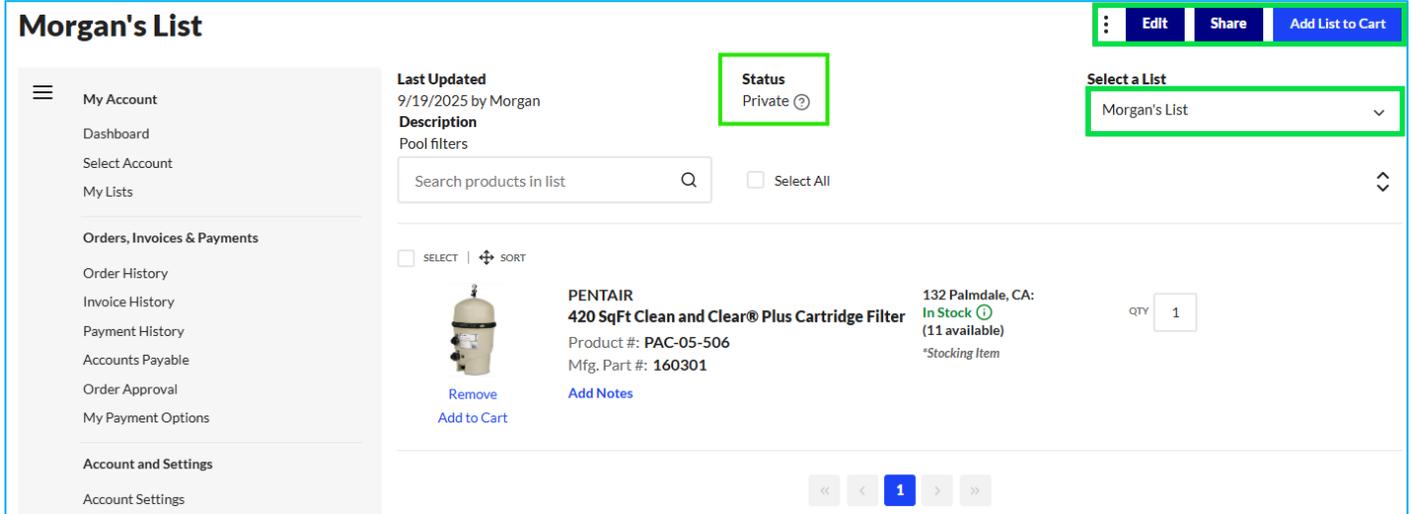
- **Search box:** Lists can be searched by name in the **search box**.
- **Sort options (up/down arrows):** Click the arrows to sort lists by **Last Updated**, **List Name: A-Z**, or **List Name: Z-A**.
- **List Titles:** Click the title of a list to open that list.
- **Add to cart (shopping cart):** Click the **shopping cart** to add all items on a list to the cart.

NOTE: *If any items are out of stock or are otherwise unavailable for purchase, a notification will prompt the user to review their cart before checking out.*

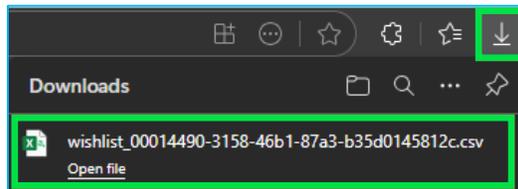
- **Delete list (trash can):** Click the **trash can** to delete the list.

LIST PAGE

Once the desired list is found on the **My Lists** page, click the **Title** link. When the page opens, the list name is displayed in the upper-left. The **Last Updated** information and **Description** (if the list has one) are displayed.



- **Status:** Lists are **Private** by default, but they can be shared with others for viewing or editing. If shared, the **Status** will include who shared the list and with whom.
- **Options (three-dots menu):** The **options** allow the user to **Export** or **Delete** the list.
 - **Export:** Download the list as an Excel file to the browser's **Downloads** folder.

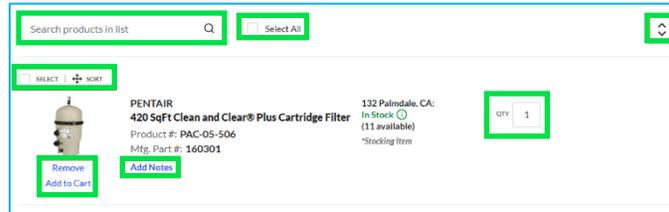


- **Delete:** Delete the list.
- **Edit:** Update the name or the description of the list.
- **Share:** Opens the **Share List** menu.
 - **Send a copy:** Enter **Your Name**, an optional **Message**, and the **Recipient Email Address**. To share with more than one recipient, separate email addresses with a comma (,). When ready, click **Send**.
 - **Allow others to view or edit this list:** First, choose to **Assign users** either **By email address** or **By current billing address**.
 - **By email address:** Enter **Your Name**, an optional **Message**, and the **Recipient Email Address**. To share with more than one recipient, separate email addresses with a comma (,). To allow the users to edit the list, check **Allow Editing**. When ready, click **Send**.

- **By current billing address:** Check the boxes to enable the options to **Send an email notification to users**, and/or to **Allow Editing**.

- **Add List to Cart:** Add all items on the list to the cart.
- **Select a List:** To navigate to another list, select it from the drop-down menu.

To make use of the list, use the following options:



- **Search products in list:** Enter a term to find matching products in the list.
- **Select All:** Selects all the items in the list.
- **Sort options (up/down arrows):** Click the arrows to sort lists by **Custom**, **Last Updated**, **List Name: A-Z**, or **List Name: Z-A**.
- **Select/Sort:** To individually select a product, check the **Select** box next to it. Rearrange the position of the product in the list by clicking and dragging the **Sort** option to the desired location.
- **Remove:** Remove the product from the list.
- **Add to Cart:** Add the product to the shopping cart.
- **Add Notes:** Add a note about the product.
- **Qty:** Update the number here to update the quantity of the product.

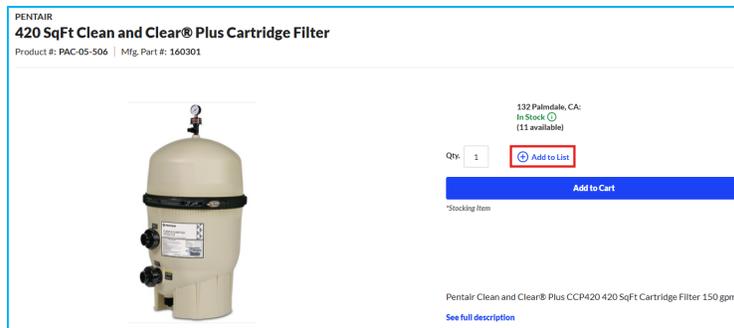
ADDING ITEMS TO LISTS

There are several different ways to add items to a list.

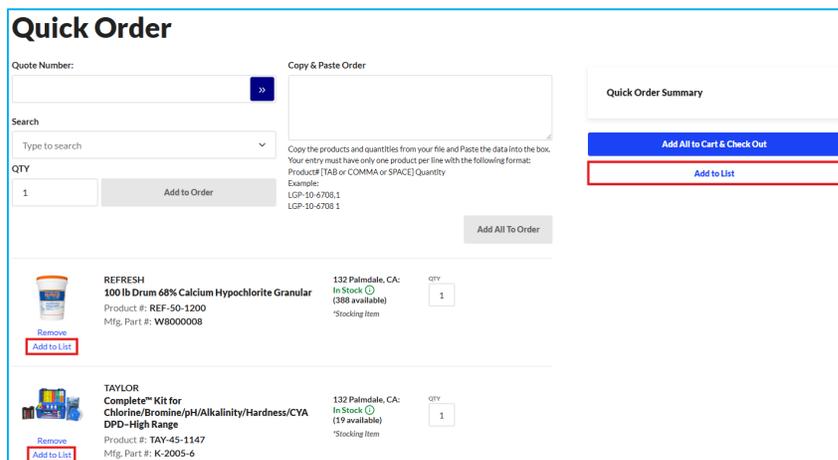
- After doing a product search, click **Add to List** next to the product from the search results.



- From a product page, click the **Add to List** link.



- From the **Quick Order** page, click **Add to List** under the **Quick Order Summary** to add all items to a list. Alternatively, click **Add to List** under a product to add it individually.

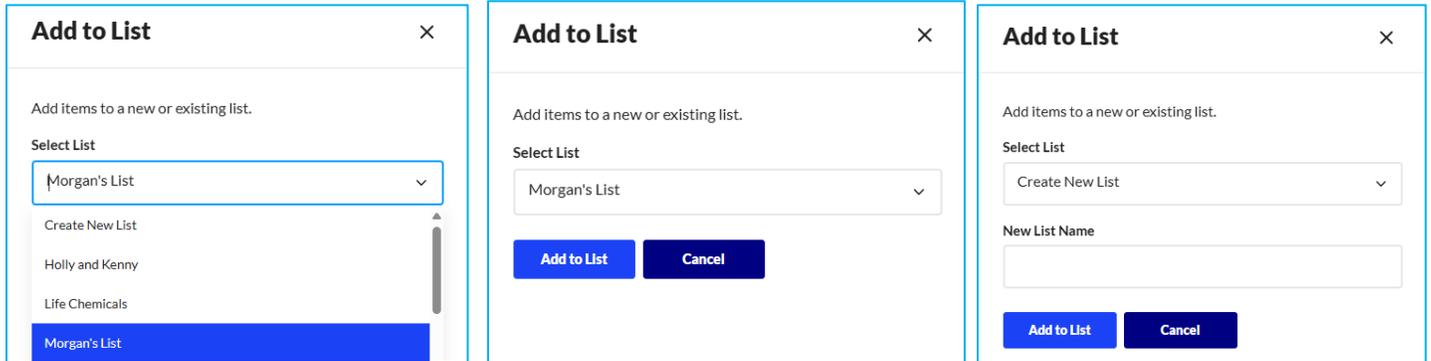


- From the **Cart** page, click **Add All to List** to add all items to a list. Alternatively, click **Add to List** under a product to add it individually.



- From the **Buy Again** page, click **Add to List** under a product.
- From the **Order History** page, click an **order number** to view the products in that order. Click **Add to List** under a product.

After clicking, the **Add to List** menu opens. From the **Select List** drop-down, either choose an existing list or choose **Create New List**. If creating a new list, enter a **New List Name**. When ready, click **Add to List**. **Select List** will default to the last list saved.



USER ADMINISTRATION AND USER ROLES

POOL360 assigns each user certain permissions based on their role. From most to least available feature access, the roles are **Administrator**, **Buyer 3**, and **Buyer 1**. It might be helpful to think of an **Administrator** as an owner, **Buyer 3** as a manager, and **Buyer 1** as a general employee.

NOTE: *It is best practice to have more than one administrator, to prevent any user administration issues should one administrator be unavailable.*

The following sections detail the differences in these roles and how administrators can manage their users.

USER ROLE PERMISSIONS

The exact permissions provided for each role are as follows:

Administrator

- Has full access to **My Account**
- Can place orders over budget without approval
- Can view invoices AND orders for assigned users
- Is the default approver when no other approver is assigned

Buyer 3

- Can place orders over budget without approval
- Can view invoices AND orders
- Can be assigned as an approver
- Cannot access **User Administration**

Buyer 1

- All orders placed require approval
- Can view orders
- Cannot view invoices
- Cannot be assigned as an approver
- Cannot access **Order Approval** or **User Administration**

The following table summarizes these roles and their permissions:

	Administrator	Buyer 3	Buyer 1
Full Access to My Account	✓	✗	✗
Access User Administration	✓	✗	✗
Access Order Approval	✓	✓	✗
Place orders without approval	✓	✓	✗
Default Approver	✓	✗	✗
Can be assigned Approver	✓	✓	✗
View Orders	✓	✓	✓
View Invoices	✓	✓	✗

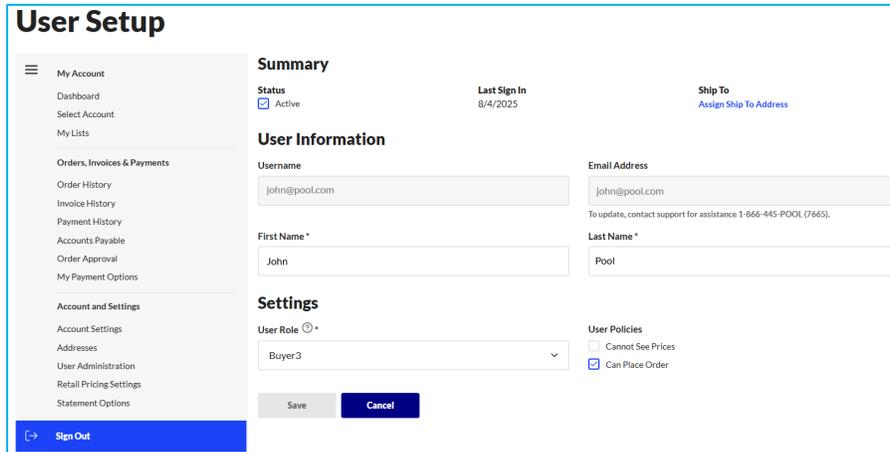
CREATING A USER IN POOL360

Account Administrators use the **User Administration** page to create new users and assign them roles.

1. Click the **My Account** drop-down and select **User Administration**.
2. Click **Create New User**.
3. Complete the **Create User** form:
 - a. **Email:** Enter the new user's email.
***NOTE:** The email address will be the new user's username and must be unique in POOL360. The username cannot be changed later.*
 - b. **First Name:** Enter the new user's first name.
 - c. **Last Name:** Enter the new user's last name.
 - d. **Assign User Role:** Select the user role to assign the new user, either **Administrator**, **Buyer 3**, or **Buyer 1**.
 - e. **Assign Approver:** Select an approver for the new user, if needed.
 - f. **User Policies:** Select the checkbox next to **Cannot See Prices** and/or **Can Place Order** to apply that policy to the user, if needed.
4. Click **Create User**.
5. A verification email will be sent to the new user's email, as submitted on the form. They must click the verification link in the email to confirm their new account and set their password.

UPDATING OR DEACTIVATING A USER IN POOL360

Account Administrators can update or deactivate users from the **User Administration** page.



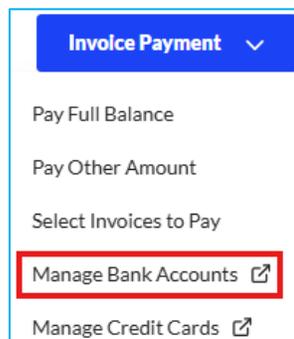
1. Click the **My Account** drop-down and select **User Administration**.
2. Click the **email address** of the user to update or deactivate from the **Username** column.
3. Edit the user's **First Name**, **Last Name**, **Ship To**, **User Role**, and applied **User Policies** as desired.
4. To deactivate a user, uncheck the **Active** option under **Status**.
5. To apply the changes, click **Save**. Otherwise, click **Cancel**.

MANAGING PAYMENTS AND PAYMENT OPTIONS

POOL360 provides multiple ways to pay for invoices and manage payment options using POOL360 Pay.

SETTING UP POOL360 PAY

1. After logging in to POOL360, click the **Pay Now** button.
2. Click the **Invoice Payment** menu item.
3. Click the **Manage Payment Accounts** menu item.



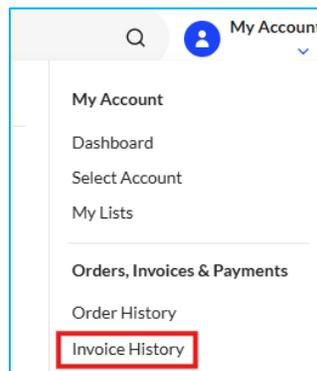
- The **POOL360 Pay Secure Payment Portal** will open. The customer's **Secure Username** should auto-populate, and they will enter their **Password**, then click the **Log in** button.



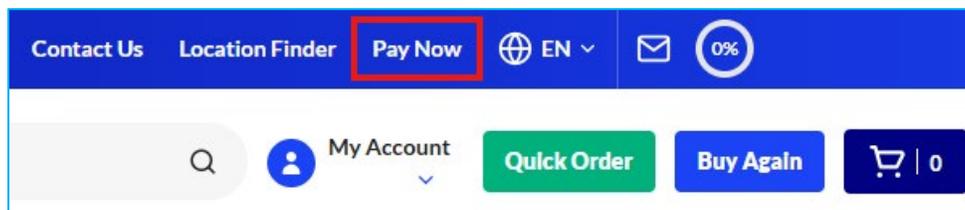
- Once logged in, customers can add, delete, and edit ACH accounts.

MAKING PAYMENTS

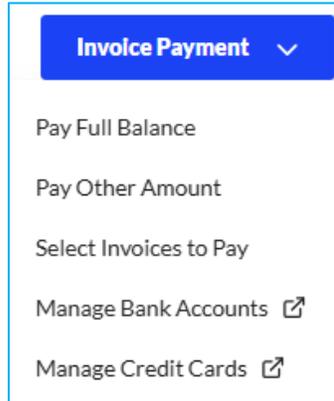
Payments are initiated from the **Invoice History** page. There are multiple ways to access **Invoice History**, one of which is from the **My Account** menu.



Another way to access POOL360 Pay is by clicking the **Pay Now** button at the top of the page.

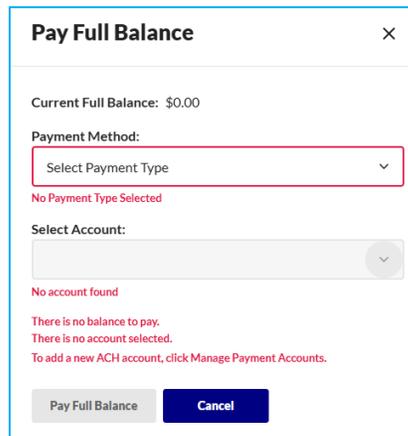


The **Invoice History** page opens. Click the **Invoice Payment** drop-down menu and click the applicable option.



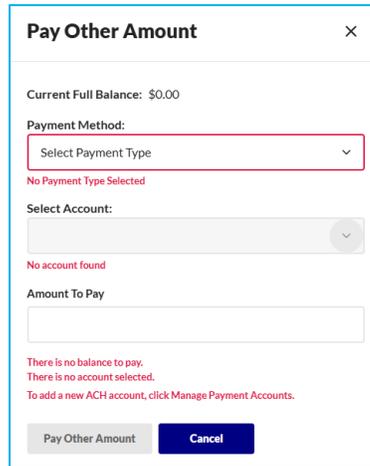
NOTE: Clicking **Manage Payment Accounts** will open a new page where saved ACH tokens can be updated, or new tokens created.

- The **Pay Full Balance** option communicates with POOL360 Pay to see if tokens have been set up, with Prelude to see if Credit Card tokens are stored, and with Prelude to determine the **Current Full Balance** owed. If one option or the other is unavailable, it will not display. After a **Payment Method** is selected, they will click the **Pay Full Balance** button.



NOTE: If the message **There is no account selected** appears after clicking the **Pay Full Balance** option, the customer needs to access **Manage Payment Accounts** to set up their account.

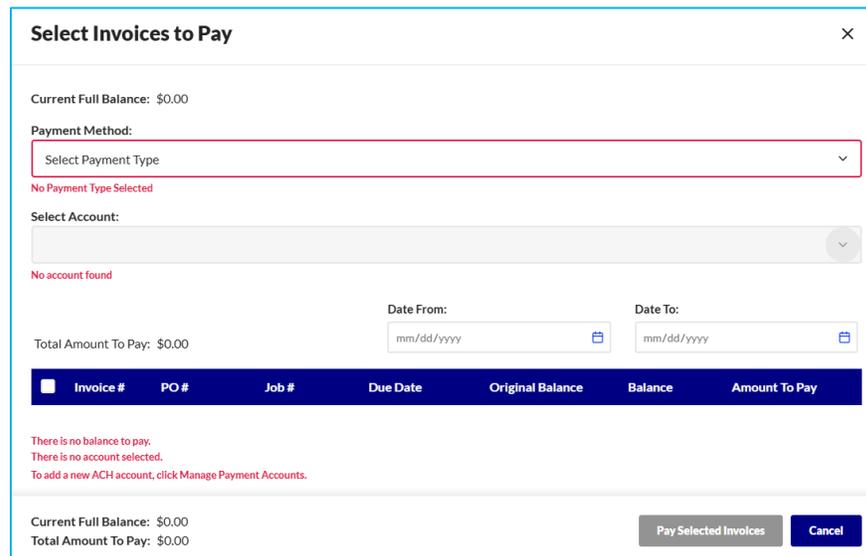
- The **Pay Other Amount** option allows customers to view their **Current Full Balance**, select the **Account to Pay** from, and enter the **Amount To Pay**. When the fields are populated, click the **Pay Other Amount** button.



The screenshot shows a modal window titled "Pay Other Amount" with a close button (X) in the top right corner. The form contains the following elements:

- Current Full Balance: \$0.00
- Payment Method: A dropdown menu with "Select Payment Type" and a downward arrow. Below it, the text "No Payment Type Selected" is displayed in red.
- Select Account: A dropdown menu with a downward arrow. Below it, the text "No account found" is displayed in red.
- Amount To Pay: An empty text input field.
- At the bottom, there are two buttons: "Pay Other Amount" (disabled) and "Cancel" (active).
- At the very bottom, there is a red error message: "There is no balance to pay. There is no account selected. To add a new ACH account, click [Manage Payment Accounts](#)."

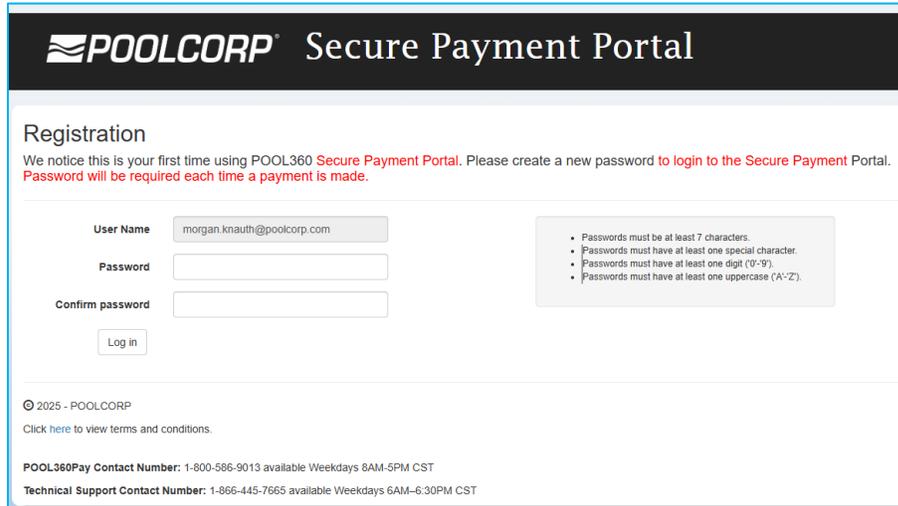
- The **Select Invoices to Pay** option allows customers to view their **Current Full Balance**, select their **Payment Method**, **Select Account**, and select which invoices they want to pay by clicking their associated checkboxes and entering the **Amount to Pay** on each invoice. Partial Payments may be made on this page.



The screenshot shows a modal window titled "Select Invoices to Pay" with a close button (X) in the top right corner. The form contains the following elements:

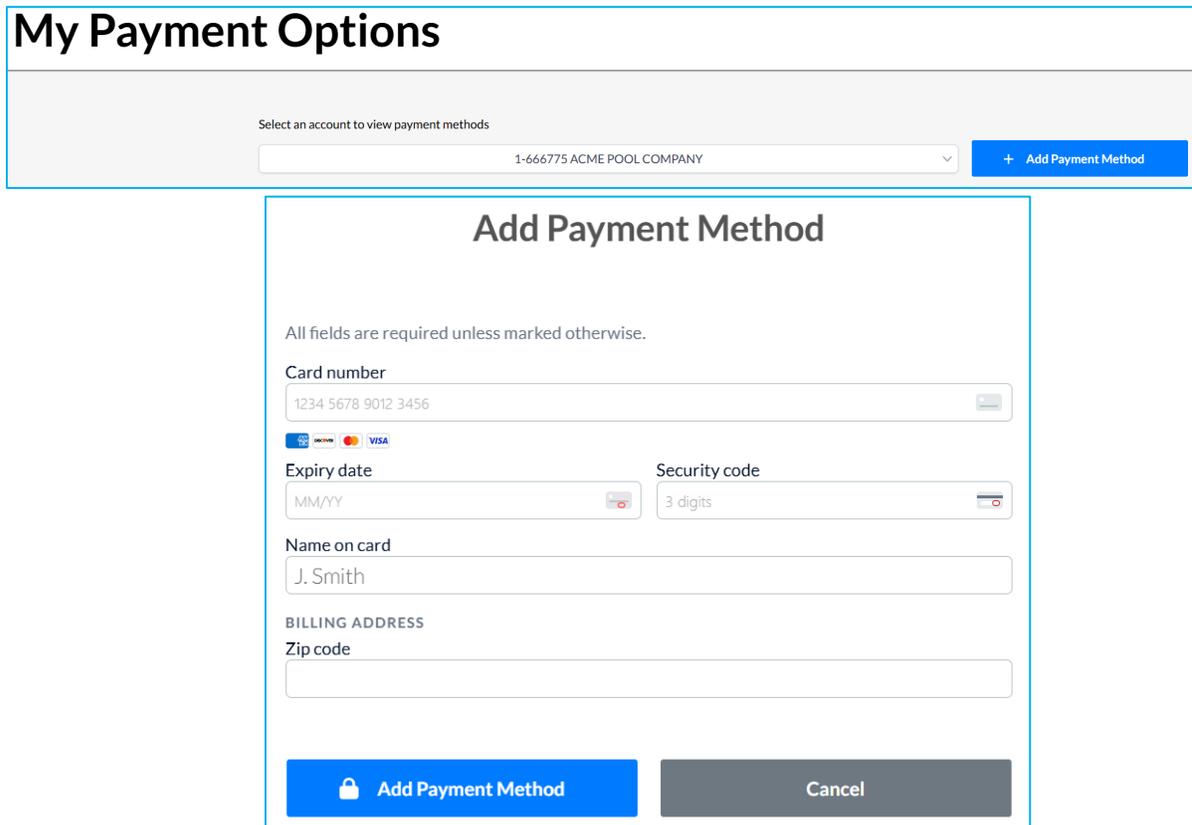
- Current Full Balance: \$0.00
- Payment Method: A dropdown menu with "Select Payment Type" and a downward arrow. Below it, the text "No Payment Type Selected" is displayed in red.
- Select Account: A dropdown menu with a downward arrow. Below it, the text "No account found" is displayed in red.
- Total Amount To Pay: \$0.00
- Date From: A date input field with a calendar icon and placeholder "mm/dd/yyyy".
- Date To: A date input field with a calendar icon and placeholder "mm/dd/yyyy".
- A table with a dark blue header and one row. The header row has columns: Invoice #, PO #, Job #, Due Date, Original Balance, Balance, and Amount To Pay. The first cell of the first row contains a checkbox.
- At the bottom, there are two buttons: "Pay Selected Invoices" (disabled) and "Cancel" (active).
- At the very bottom, there is a red error message: "There is no balance to pay. There is no account selected. To add a new ACH account, click [Manage Payment Accounts](#)."
- At the bottom left, there is a summary: "Current Full Balance: \$0.00" and "Total Amount To Pay: \$0.00".

- The **Manage Bank Accounts** option allows customers to manage their ACH accounts. Clicking this option brings the customer to POOL360 Pay **Secure Payment Portal**, where they can set up an account, submit an initial deposit, and run the account verification process.



The screenshot shows the 'Registration' page of the POOLCORP Secure Payment Portal. The page title is 'Registration'. Below the title, there is a message: 'We notice this is your first time using POOL360 Secure Payment Portal. Please create a new password to login to the Secure Payment Portal. Password will be required each time a payment is made.' The registration form includes fields for 'User Name' (pre-filled with 'morgan.knauth@poolcorp.com'), 'Password', and 'Confirm password'. A 'Log in' button is located below the password fields. To the right of the password fields, there is a list of password requirements: 'Passwords must be at least 7 characters.', 'Passwords must have at least one special character.', 'Passwords must have at least one digit (0-9).', and 'Passwords must have at least one uppercase (A-Z)'. At the bottom of the page, there is copyright information for 2025 - POOLCORP, a link to view terms and conditions, and contact numbers for POOL360Pay and Technical Support.

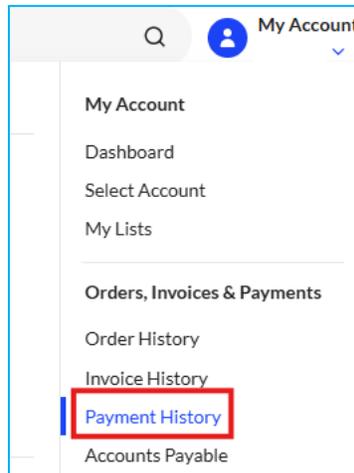
- On the **Manage Credit Cards** page, view current payment options per account by clicking the drop-down beneath **Select an account to view payment methods**. To add a new payment method, click **Add Payment Method**.



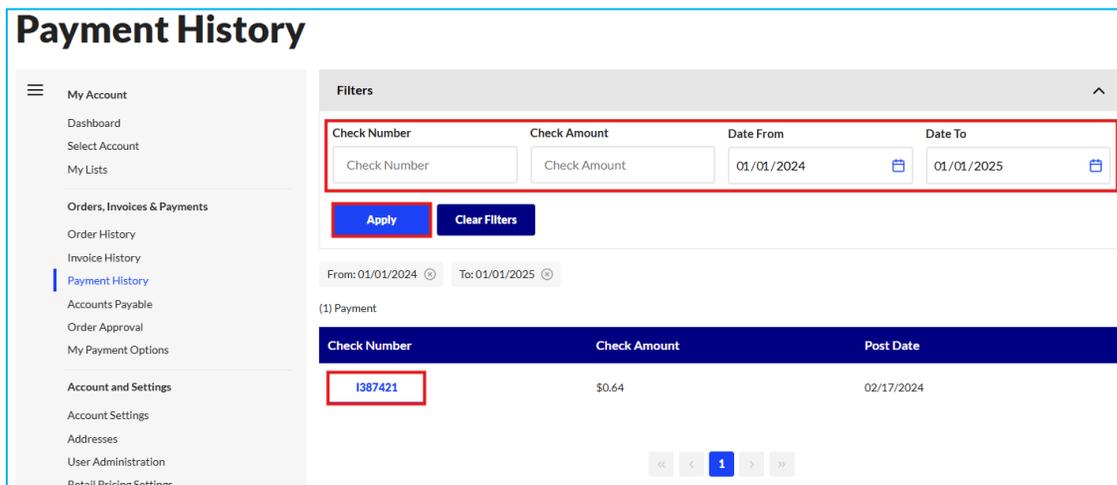
The screenshot shows the 'My Payment Options' section of the POOL360 e-commerce interface. The main heading is 'My Payment Options'. Below the heading, there is a section titled 'Select an account to view payment methods' with a dropdown menu showing '1-666775 ACME POOL COMPANY' and a blue '+ Add Payment Method' button. Below this, there is a detailed 'Add Payment Method' form. The form includes a note: 'All fields are required unless marked otherwise.' The fields are: 'Card number' (pre-filled with '1234 5678 9012 3456'), 'Expiry date' (MM/YY), 'Security code' (3 digits), 'Name on card' (pre-filled with 'J. Smith'), and 'BILLING ADDRESS' (Zip code). At the bottom of the form, there are two buttons: a blue 'Add Payment Method' button with a lock icon and a grey 'Cancel' button.

VIEWING PAYMENT HISTORY

Navigate to **Payment History** by clicking the link from the **My Account** drop-down menu.



After opening the **Filters** menu, select from the available filter options for **Check Number**, **Check Amount**, **Date From**, and **Date To** values. Click **Apply** to activate the filters.



NOTE: *Payments made by Credit Card/Credit Memo/POA will not display.*