

Coastal Pools

Creating a Modern, Self-Service Showroom That Sells



CASE STUDY

Industry	Custom pool design, construction, and renovation
Users	Showroom sales staff and customers
Location	Queenstown, Maryland
The Build	Custom in-showroom selection and budget approval app
Time to Production	3 months

SECTION 1: THE PROBLEM

A Six-Figure Sale That Slowed Down In The Showroom

Coastal Pools projects run \$100K to \$300K, and the budget a customer approved in JobTread never named a single specific product. It committed to tiers instead, such as a ceramic tile of a certain variety and surface treatment at a set price ceiling. Which tile, which color, and which variation within that tier all got decided later in the showroom, standing in front of the physical samples. **Six-figure sales relied on paper and mental math.**

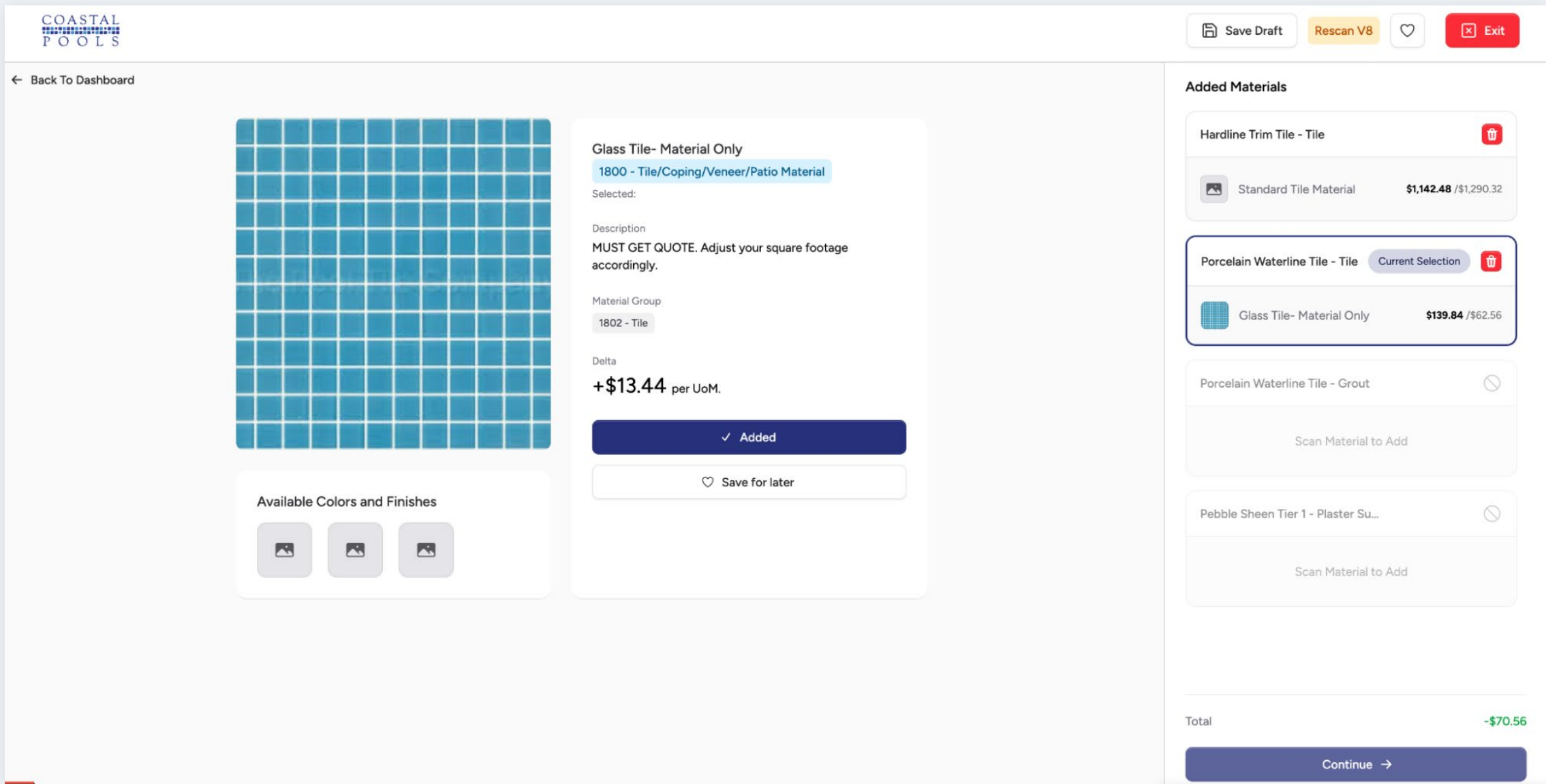


- A salesperson walking the customer through the printed budget, the samples, and the paperwork by hand
- A manual calculation of the price difference every time a customer chose above their approved tier, then presenting it and waiting for approval before moving on
- Item-level product detail pulled from separate external catalogs, since the JobTread catalog is organized by tier
- No clean way to sell the furniture, grills, and yard accessories that sit outside the original budget entirely
- A paper signature, then a scan, then a manual re-upload back into JobTread

SECTION 2: THE SOLUTION

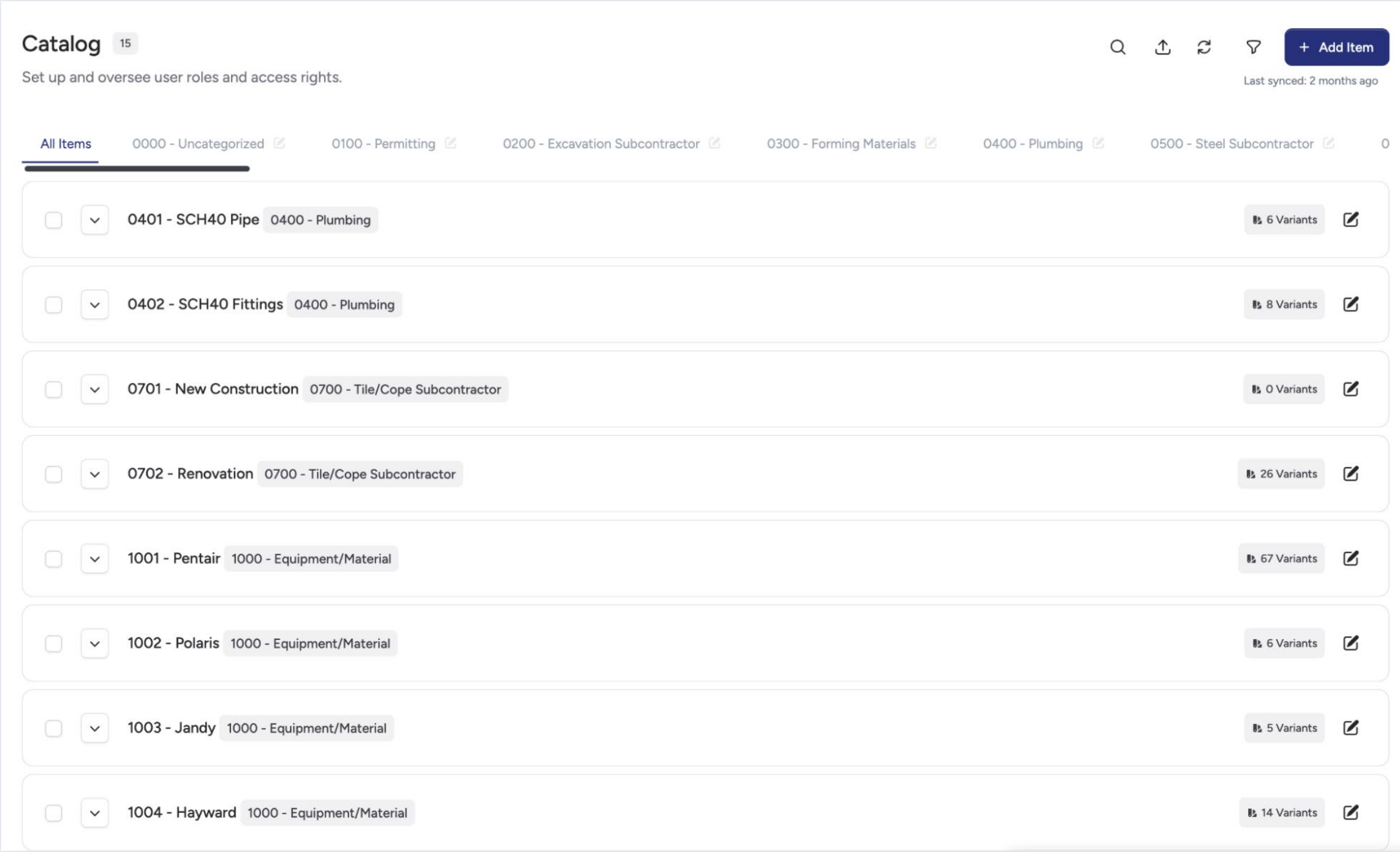
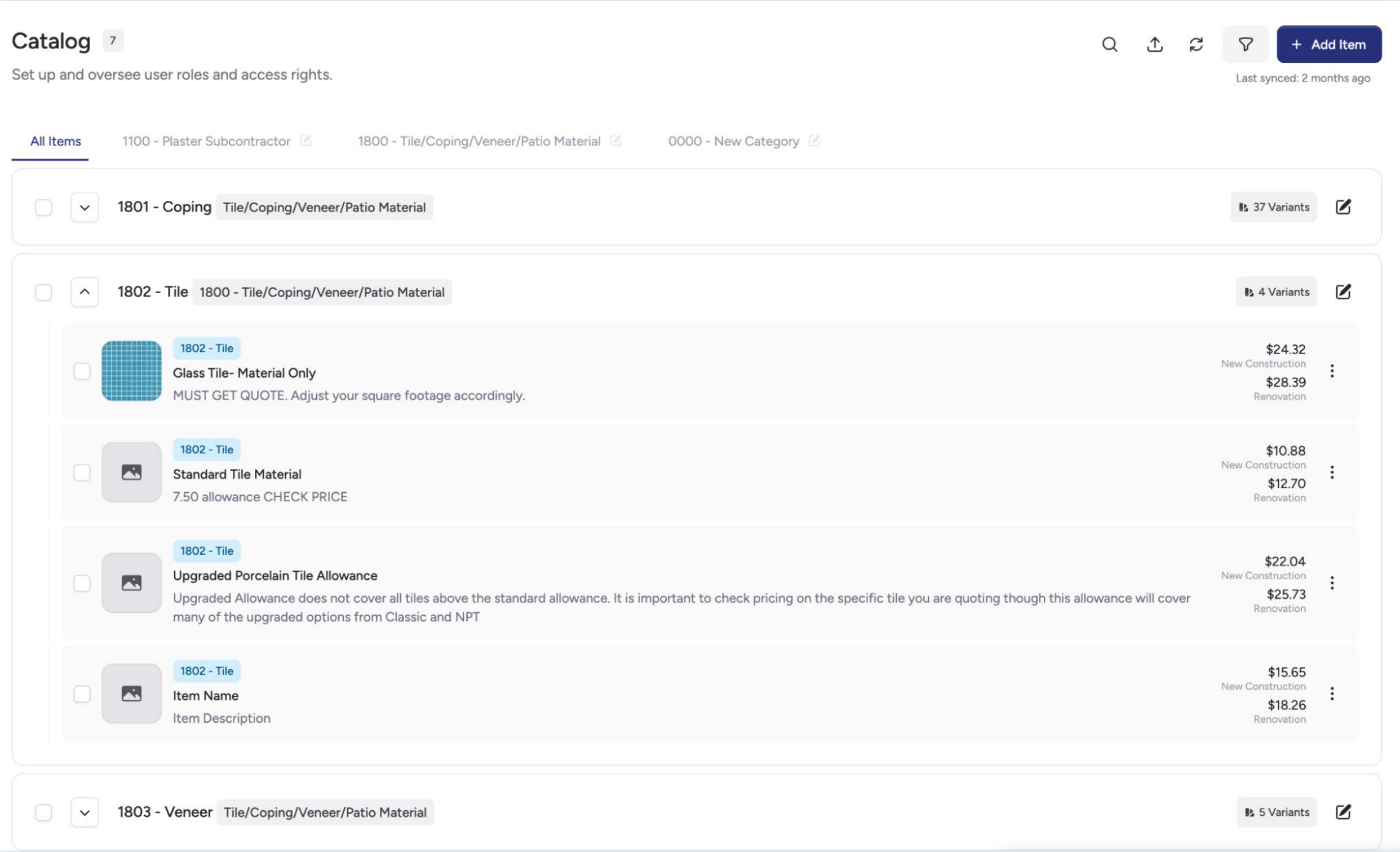
The Showroom Becomes The Interface

The salesperson selects the customer’s project from a list synced out of JobTread, sets the pool shape to freeform or geometric, and hands over a tablet. From there, the customer walks the floor on their own, **scanning QR codes stuck next to the physical samples**. Every scan shows the item alongside how it affects the approved budget, priced per unit of measurement. Customers can add items, swap them, and compare options before committing to anything, with a running total showing the original budget against the current one. Once the selections are final, the customer signs on the tablet. The signed document then uploads itself into JobTread.



The customer sees the cost of their own choice

The part the customer never sees is the catalog underneath it. Every item carries its own cost, taxes, waste factor, delivery cost, and separate markups for new construction and renovation, because Coastal Pools runs a higher margin on renovation work. Items are also tagged by pool shape for availability, and by whether they’re scannable, which keeps permits and fees off the customer’s screen.



Everything in the project, and the part a customer chooses from

Which Items Should Customers See?

A pool project contains far more line items than a customer ever chooses from. Permits and construction fees are not decisions the buyer gets to make. Working out which handful of items belong in front of a customer, and how those items should be grouped, turned out to be the hardest problem in the build.

Digitizing And
Innovating The
Sales Process

Coastal Pools didn't have to give up JobTread or change how their showroom works. We kept what was already working and modernized it.

Rebuilt from the existing process:

- An item catalog, consolidated from JobTread's tier-level data and the separate external catalogs
- Pricing structure covering cost, taxes, waste factor, and delivery cost, with separate markups for new construction and renovation
- The signed selection record that lands in JobTread
- Quantities locked to the approved budget



Newly innovated features:

- A unified catalog carrying specific item variations rather than price tiers
- Auto-generated QR codes for every item, printable as stickers for the showroom floor
- Scannable flags that filter permits, fees, and construction costs off the customer's screen, and switch off out-of-stock items cleanly
- Pool shape compatibility enforced automatically against each project
- A real-time budget delta on every item, a running total against the approved budget, and side-by-side comparison before committing
- Items added outside the original budget, with customer-selected quantity
- Digital signature captured on the tablet
- PIN-protected exit, so a customer holding the device can't reach anyone else's project
- Automatic upload of the signed document into JobTread

Why JobTread Stayed

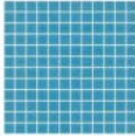
Coastal Pools runs their business in JobTread, and nobody wanted a second place where project data could go stale or contradict itself. So the app doesn't let anyone create or change a project. It pulls the budget and the approved items in, sends the signed selections back, and leaves the rest alone.

Before	Today
A salesperson walking every customer through printed budgets and options by hand	The customer walks the floor with a tablet and scans the samples themselves
Budget differences calculated manually, one item at a time	Every choice priced against the approved budget as it's made
Furniture, grills, and accessories sold outside the process	Off-budget items added and approved inside the same session
Print, sign, scan, re-upload to JobTread	Signed document generated and uploaded automatically
One salesperson, one customer	Support for several tablets running in parallel

Understanding The Full Value Of Coastal Pools' Custom Software

- **The manual math is gone.** Every upgrade prices itself against the approved budget the moment the customer scans it, so nobody calculates the difference by hand or presents it after the fact.
- **The paperwork loop closed.** The signed selection lands in JobTread when the customer finishes, with no printing, scanning, or re-entry in between.
- **One salesperson is no longer the bottleneck.** The app supports several tablets at once, so more than one customer can work through their selections at the same time.
- **Off-budget items are sellable inside the flow.** A customer who wants chairs, a grill, or patio furniture can add them and approve the budget increase on the spot with a signature.
- **The showroom itself sells.** QR stickers sit next to the samples throughout the floor, so prospects who haven't committed to anything yet still see a tech-forward experience while they browse.



DESCRIPTION	DELTA
 Laticrete Permacolor Grout 6x6=200SF Coverage 1x1=80SF Coverage	\$0.00
Upgraded Porcelain Tile Allowance Upgraded Allowance does not cover all tiles above the standard allowance. It is important to check pricing on the specific tile you are quoting though this allowance will cover many of the upgraded options from Classic and NPT	+ \$64.17
 Glass Tile- Material Only MUST GET QUOTE. Adjust your square footage accordingly.	\$0.00
Pebble Essence Pool Only Pearl, Harbor, Aegean, Aqua, Atlantic.	+ \$10,600.00
 16"x24"x2" NT Trading Travertine/Marble Coping (A,A1) Afyon Glacier Ice, (ant or SB) Luxe Blue Marble (ant or SB) , Agean Cream (ant or SB), Antico, Ella, Timeless Walnut, Ivory Vanilla. Not on standard price sheet, Jim confirmed these pieces are stock and would be priced the same as the 16"x24" on the price sheet.	+ \$52.52
TOTAL + \$10,716.69	

Please note that all materials are ordered on the day of your excavation, any changes to materials that happen after your Excavation Day are subject to restocking fee's or penalties for materials that cannot be restocked.

"By signing below you agree to the design, work description, features, options upgrades and construction selections for your project as included in this Proposal and you agree that you have read and agree to the terms of the Coastal Pools Construction Agreement attached hereto and made a part hereof."

The above specifications, costs, and terms are hereby accepted.



TEST TESTERMAN

May 29, 2026 at 9:17 PM

DATE

The signed selection, filed automatically

SECTION 3: THE PATH FORWARD

From One Showroom To Several

Multi-location support is largely built and waiting on the second showroom Coastal Pools plans to open. After that, the roadmap covers expanded reporting and native project creation inside the platform, so the system can stand on its own if their platform situation ever changes.

Ready to replace your outdated systems and processes?

