
Working with the Packages Properties Tab

Roofing Passport provides a unique set of tools, called *Packages*, to manage all of the *Accessories*, *Labor* and *Freight* associated with a re-roofing job. Technically speaking, a *Package* provides a calculated value to manage these materials and services, based on roof geometry or some form of user input.

Roofing Passport *Packages* are endlessly customizable, and no two companies implement them in exactly the same way. Since every implementation of *Packages* is unique, for our purposes here we will provide a brief, high-level overview, and then turn to the specifics of how to access and successfully apply *Packages* to your jobs.

NOTE – *Sheathing* and *Trim* are the only types of materials that appear in the Roofing Passport 3D model and drawings. That is to say, *Accessories* are not included. ;-)

Overview

There are two different types packages:

- **Add-on** – An *Add-on* is a type of package that users can choose either to include or exclude from a given job. If an *Add-on* package is included in a job, then all materials and services associated with that *Add-on* will be added to the job’s material list and quote price. For example, your organization may setup an *Add-on Package* for *Underlayment*, which is not captured in model or outputs generated automatically by Roofing Passport.
- **Base Macro** – A *Base Macro* represents an item or items that are added to a job automatically, without any action or input required by the end user. For example, a *Base Macro* may be used to calculate the number of screws needed for a job based on *Linear Feet* or *Surface Area*.

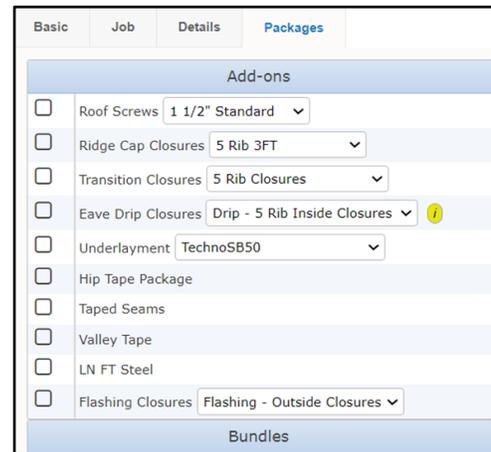


Figure 1: Example Packages Tab on the Properties Pane.

NOTE – *Base Macros* are invisible to the end user. The only way to tell that they are present and in use is by reviewing the required materials and services listed in *Job Review Mode*.

- **Bundle** – A *Bundle* is a collection of two or more types of materials and/or services that are packaged and sold together as a single unit, with a single assigned price. Bundles are used to present customers with a single line-item price, rather than a full breakdown. Like an *Add-on* package, users have the ability to include or exclude an available bundle from a given job.

- **Options** – An *Option* package is used to create alternative designs, configurations and treatments for a job from which the customer may choose. Options are not included in the price for a job unless the customer decides to add them to the list of the agreed upon work. Options can be excluded from a job all together, included in the quote (as a bundle), or shown as a price line-item not included in the total quoted price.

(Continued on the following page.)

Adding a Package to a Job

Packages can be added to a job from the *Edit* page in *3D Mode*, *Job Review Mode*, and *Drawings Mode*. (Note, *Package* access from the *View* and *Prep for Order* pages is “read only.”) In the example shown in Figure 1 below, we have opened a job in the *Edit* page. In the *Properties Pane* at right, notice the *Packages* tab. We will click on that tab to open it, as pictured in Figure 2.

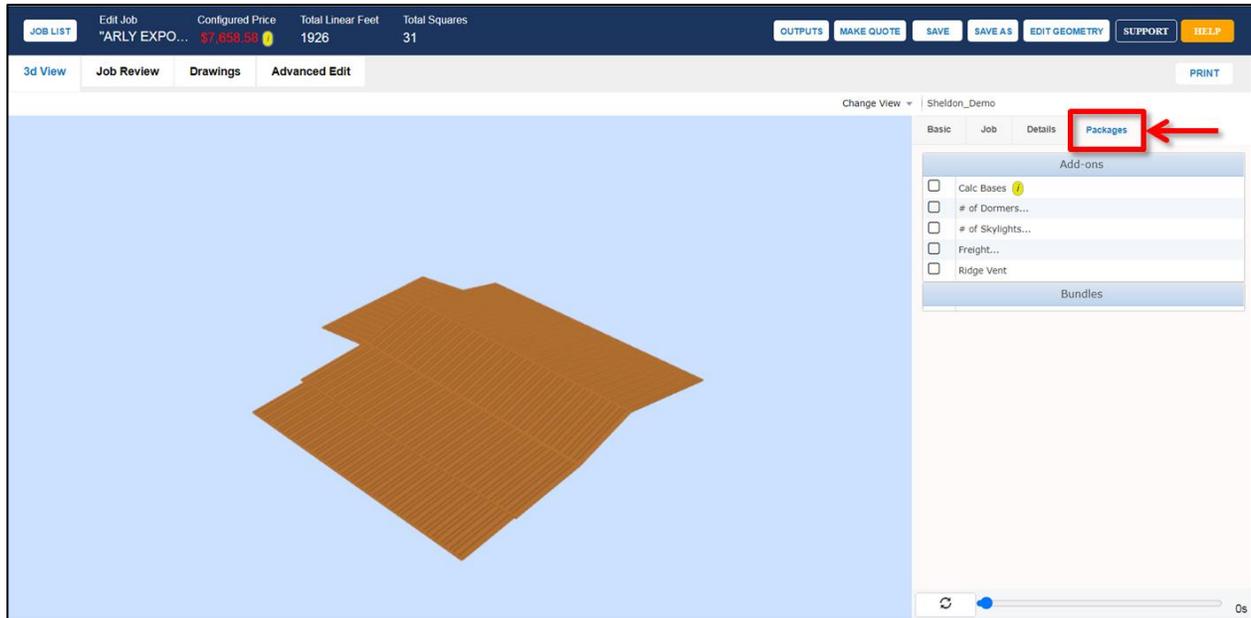


Figure 2: Open a job on the *Edit* page, and click on the *Packages* tab in the *Properties Pane*.

The *Packages* tab will display all of the *Packages* that your Systems Administrator has made available for your use. As you can see in Figure 2, this Systems Administrator has created *Add-on Packages* for Underlayment and Attachment Materials.

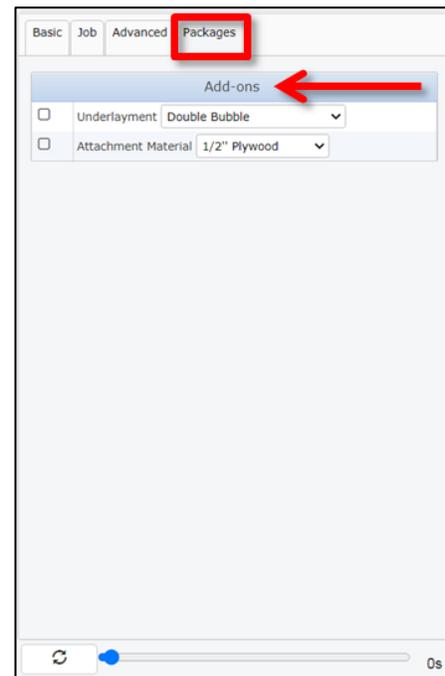


Figure 3: Available *Add-on Packages* are all listed the *Packages* tab.

For our example, we are going to add 30 # Underlayment to our job. To begin, we will click in the checkbox next to Underlayment, in order to activate the Underlayment *Package Group*. (See Figure 3.) Clicking on the arrow for the drop-down, we will select 30 # Synthetic Underlayment. That's it. We have now added the desired Underlayment to our entire re-roofing job.

NOTE - If there were only one Underlayment *Package* available, there would not be a drop-down list, and we would simply click in the checkbox to add the *Package* to our job.

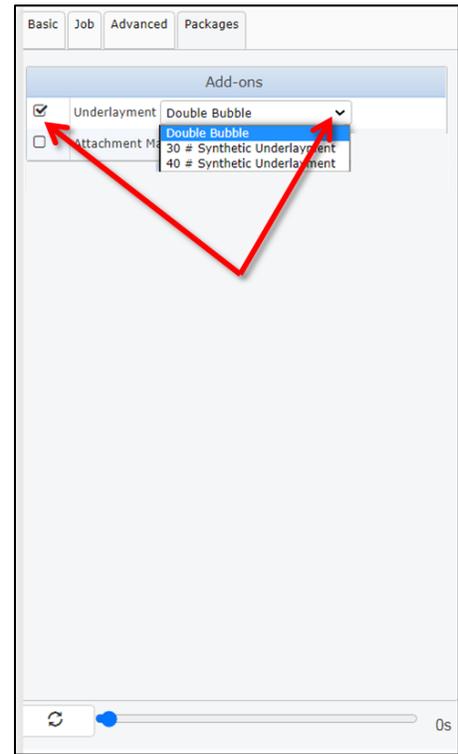


Figure 4: Click in the checkbox to add a *Package* to your job.

Package User Prompts

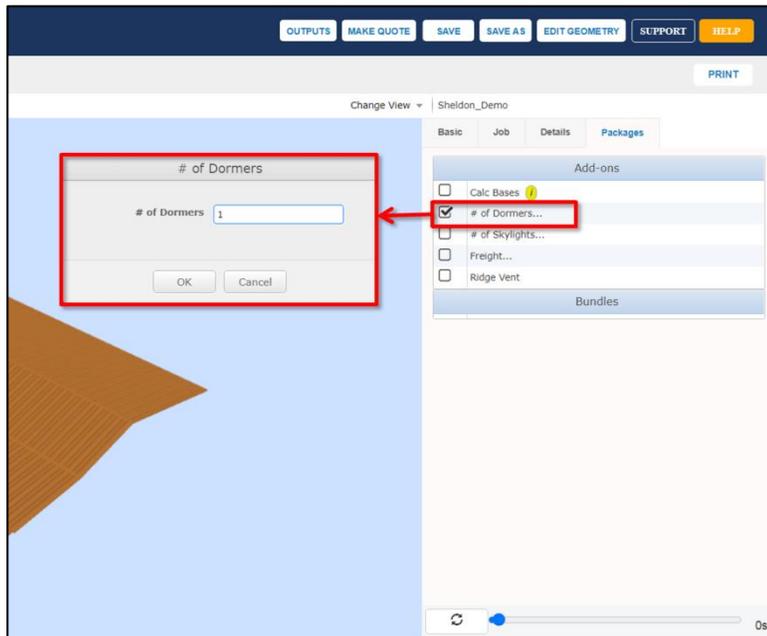


Figure 5: Some *Packages* open a dialog box requiring user input.

When activated (i.e. the checkbox is checked), some *Add-on Packages* open a dialog box requiring user input. For example, in Figure 4 at left, a *Package* used to calculate some of the labor costs prompts the user to enter how many layers of previous material must be removed before re-roofing can begin.

Checking for the Presence of a Package

How can you tell if a *Package* has been successfully added to a job? There are a few ways. The first is to look at the Total Calculated Price at the top of the *Edit* page. As you can see in Figure 5 below, adding the Underlayment *Package* has raised the Total Calculated Price for our job.

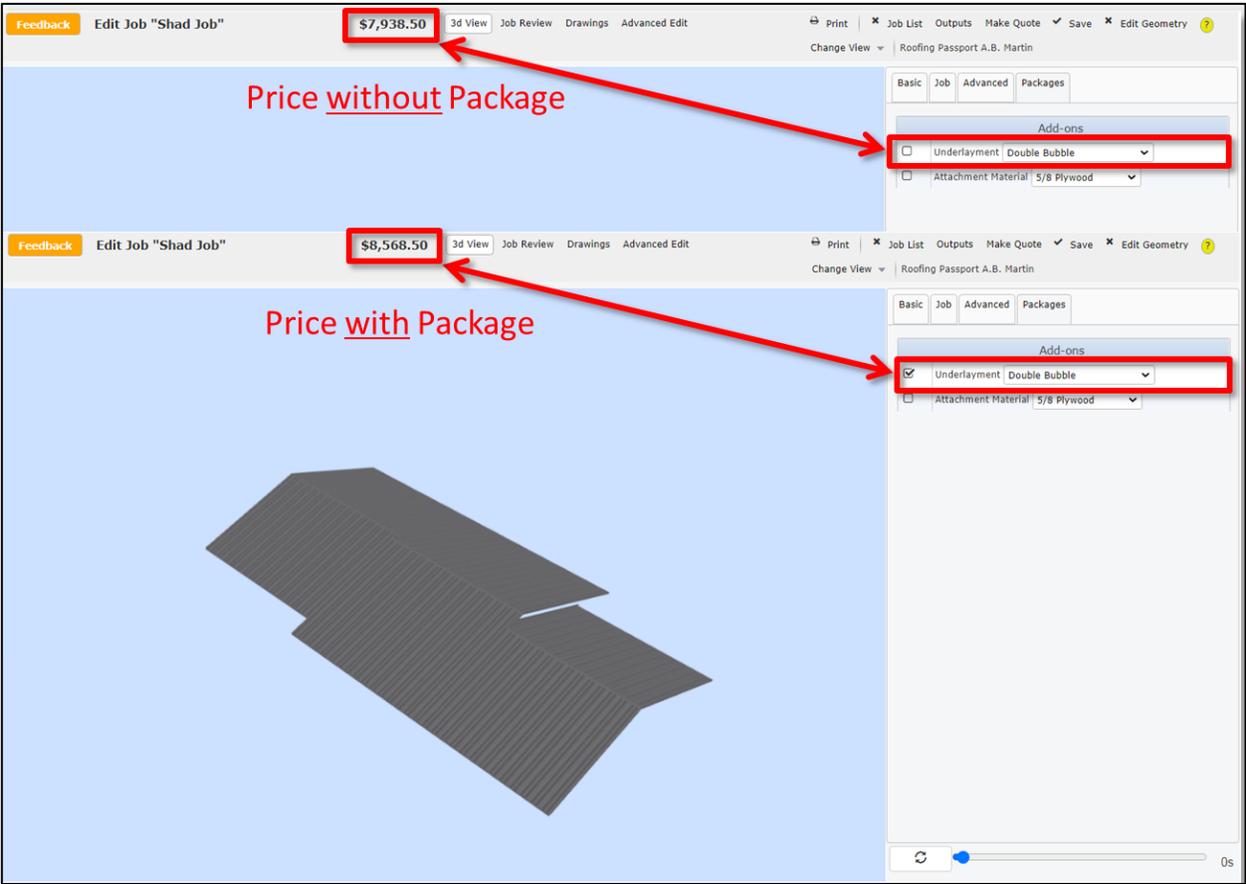


Figure 6: Adding a *Package* to a job changes that job's Total Calculated Price.

Job Review Mode offers two places to check for the presence of an added *Package*. One is the *Summary* tab at the bottom of the window. As you can see in *Figure 6* below, adding our *Underlayment Package* to this job has changed the *Price* and *Weight* on the *Accessories* line item. The addition of *Labor* and *Freight Packages* would, likewise, change these values for their respective line items.

The screenshot displays two panels of a software interface for 'Edit Job "Shad Job"'. The top panel shows the job summary with a total price of \$7,938.50. The bottom panel shows the same job summary with a total price of \$8,196.50, reflecting the addition of a package. Red annotations highlight the changes to the 'Accessories' line item and the 'Underlayment' package selection.

Item	Price	Weight
Sheathing	\$5,946.36	0.00 lbs
Trim	\$709.70	0.00 lbs
Accessories	\$1,282.44	103.00 lbs
Labor	\$0.00	0.00 lbs
Freight	\$0.00	0.00 lbs
Taxable Total	\$7,938.50	
Sales Tax	\$0.00	
Total	\$7,938.50	

Item	Price	Weight
Sheathing	\$5,946.36	0.00 lbs
Trim	\$709.70	0.00 lbs
Accessories	\$1,540.44	178.00 lbs
Labor	\$0.00	0.00 lbs
Freight	\$0.00	0.00 lbs
Taxable Total	\$8,196.50	
Sales Tax	\$0.00	
Non-taxable Total	\$0.00	
Grand Total	\$8,196.50	178.00 lbs

Figure 7: An added *Package* will change the *Price* and *Weight* (if applicable) values on the *Summary* tab.

A third place to check for the presence of a *Package* is on the Accessories, Labor, and Freight tabs at the bottom of the *Job Review Mode* window. As you can see in Figure 6 below, details about the Underlayment *Package* we added to our job are now displayed on the *Accessories* tab. Values in the Labor and Freight tabs would likewise change if any of these *Package* types are added to our job.

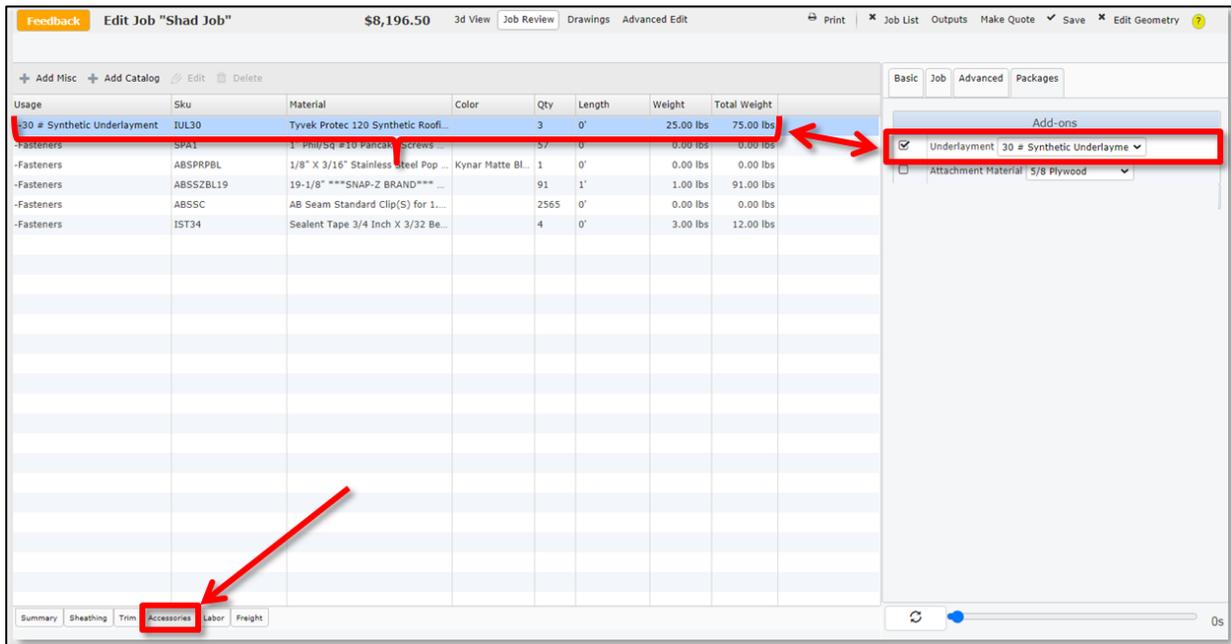


Figure 8: Material for the added Underlayment *Package* now appears on the *Accessories* tab at the bottom of the *Job Review* window. Labor and Freight *Packages* would, likewise, appear on their respective tabs at the bottom of this page.

TIP – Double click on the Total Calculated Price field, at the top of the page, to toggle the visibility of columns for Cost, Price, Total Cost, and Total Price on the *Job Review* tabs. (See Figure 8 below.)

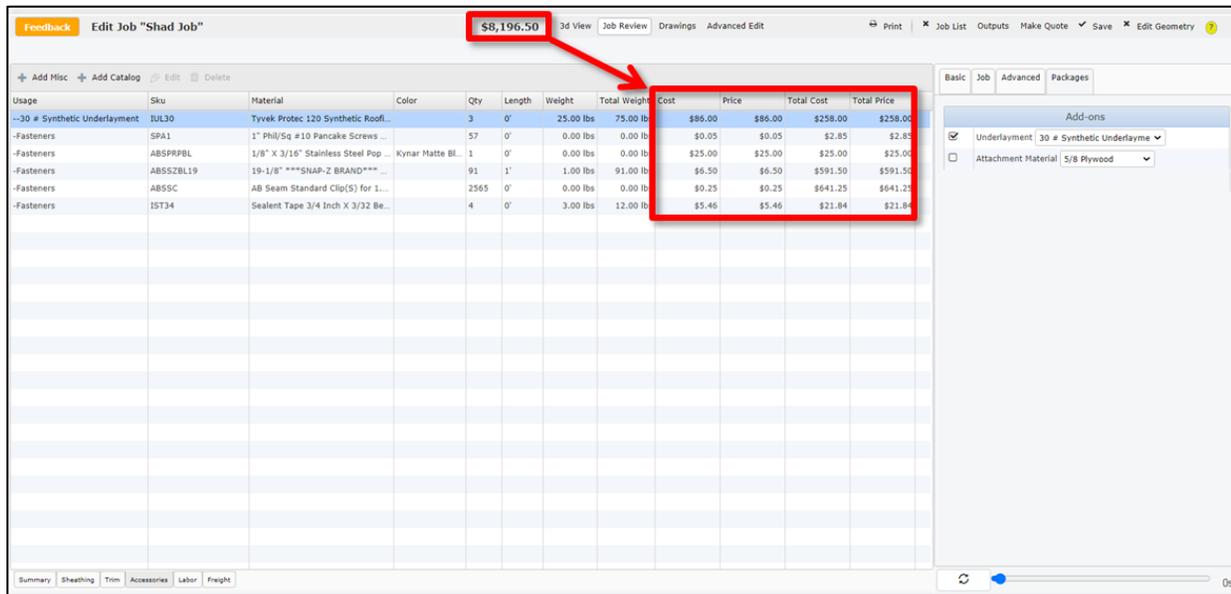


Figure 8: Double click on the Total Calculated Price at the top of the *Edit* page to toggle back and forth between hiding and displaying these four addition columns on the *Job Review* tabs.

The fourth and final place to check for the presence of one or more added *Packages* is on your *Materials List* outputs. As with *Job Review Mode*, *Package*-related materials and services will appear under their relevant categories on the outputs.