

Getting Started with Roofing Passport

Quick Start User's Guide

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Purpose

The purpose of this document is to provide users with the essential information needed to modify a newly created job, in order to make any changes necessary before a bid is provided to the customer. Additional context-sensitive help information about the job editing process is provided directly within the application itself. Click [here](#) to learn how to use Roofing Passport's in-application help system. If you have any questions about the terminology used within this document, please check our [Glossary of Terms](#).

Editing a Job

Once a new Roofing Passport job has been created, it will automatically be added to the *Jobs List* on your homepage. To begin editing, scroll down and locate the new job on your *Jobs List*. Click on the Job Name, as pictured in **Figure 1** below. This will open the Roofing Passport *Edit Job* page shown in **Figure 2** on the following page.

The screenshot displays the Roofing Passport interface. At the top, there's a navigation bar with the Sherwin-Williams logo, a user profile dropdown, and links for 'Elevate Your Products' and 'FAQ'. Below this is a 'Job Status Overview' card showing 168 Active Jobs, 18 Archived Jobs, and 11 Pending Dimensions. The main section is the 'Job List (Your Company Name)' with a 'New Job' button. The job list is a table with columns: Source, ID, Job Name, Address, Last Modified, Status, Notes, and Actions. The 'Job Name' column is highlighted with a red box, and the first row, 'Johnson Residence', is selected. The table also includes pagination information: '1 to 10 of 168' and 'Page 1 of 17'.

| Source | ID | Job Name | Address | Last Modified | Status | Notes | Actions |
|--------|--------|------------------------|---|--------------------------|---------|-------|---------|
| | 204732 | Johnson Residence | 4811 NW 77th Ct Pompano Beach FL 33073 | 6-10-2022 10:43:52 AM | Pending | | |
| | 199237 | Novelties Plus | 2909 Balmoral Dr Edmond OK 73034 | 5-27-2022 11:17:43 AM | New | | |
| | 198483 | Berkshire Farms | 2909 Balmoral Dr Edmond OK | 5-24-2022 1:45:06 PM | Pending | | |
| | 188985 | Holly Tree Ranch | 12445 Camino Valloso San Diego CA 92130 | 4-26-2022 8:58:40 PM | New | | |
| | 180806 | Simmons Frozen Custard | 3720 Ximines Ln N Plymouth MN 55441 | 4-5-2022 12:15:17 AM | New | | |
| | 178350 | Wilson Studio | 6553 Berlin St Halifax NS B3L 1T8 | 3-29-2022 8:40:11 PM | New | | |
| | 177356 | Shady Acres | 1310 Poinciana Ave Fort Myers FL 33901 | 3-26-2022 2:04:22 AM | New | | |
| | 163553 | Bennington Complex | 16150 County Road 107 SW Kensington MN 56343 | 2-16-2022 9:58:09 PM | New | | |
| | 159402 | Cahill Horse Ranch | 1315 Rainbow Cir Manteno IL 60950 | 2-4-2022 1:44:48 PM | New | | |
| | 154238 | Winding Way Farm | 2861 Timberview Trl Chaska MN 55318 | 1-19-2022 12:44:18 PM | New | | |

Figure 1: Locate the new job on your *Job List* and click on the *Job Name* to open the *Edit Job* page.

The Edit Job Page

As you can see in **Figure 2** (below), the *Edit Job* page is divided into four basic sections: the *Page Header* (1), the *Mode Controls* (2), the *Display Pane* (3), and the *Properties Pane* (4). Below **Figure 2** is a brief description of the primary functions of each of these sections of the page.



Figure 2: Parts of the Roofing Passport *Edit Job* page in the default *3D View Mode*.

1. **Page Header** – The left side of the *Page Header* contains basic high-level information about the job including the job name, the price of the job as it is currently configured, and the total linear feet and total squares involved. The right side of the *Page Header* presents seven buttons for frequently used commands. These command buttons are described [below](#), on the following page.
2. **Mode Controls** – Roofing Passport's *Mode Controls* provide different views and editing functions for the various aspects of a job. The four *Modes* include: [3D View](#), [Job Review](#), [Drawings](#), [Advanced Edit](#) and [Bids](#). Click on the links provided to jump to a detailed explanation of each *Mode*.
3. **Display Pane** – The *Display Pane* provides a visual representation of one of five sets of data, depending upon the *Mode Control* that has been selected. Click on the links provided under *Mode Controls* (above) to view the contents of the *Display Pane* provided in each of the different *Modes*.
4. **Properties Pane** – The *Properties Pane* contains tabs with fields of information that are used to specify every aspect of a job. The contents of the *Properties Pane* differ, based on the *Mode Control* that has been selected. Click [here](#) to jump to an overview of the *Properties Pane*, or click on the links listed above under *Mode Controls* to review the contents of the *Properties Pane* for each *Mode*.

Command Buttons in the Page Header

As mentioned above, the *Page Header* on the *Edit Job* page provides quick access to frequently used commands. Below is a brief description of each of these command buttons:



Figure 3: Command buttons located on the *Edit Job Page Header*.

- **Outputs** – Clicking on the `Outputs` button opens Roofing Passport’s *Download Outputs* dialog box, from which you can choose to download roof layouts, sheathing drawings, job data, sales proposals, sample quotes, and more.
- **Make Quote** – Once you are satisfied with the design, materials, and pricing for a job, you will click on the `Make Quote` button to lock-down the configuration and price. This will also change the job’s status to “Quoted.” (Don’t worry; you can always re-quote a job if changes need to be made after you have clicked on the `Make Quote` button.)
- **Save** – Click on the `Save` button to preserve any changes you have made to a job. We recommend that you click on the `Save` button early and often while you are working!
- **Save As** – The `Save As` button allows users to create a copy of an existing job using a new job name. The original job – and its original name – will remain unaffected.
- **Edit Geometry** – This button opens the *Edit Geometry* page, which automatically identifies any issues found with the current geometry. The *Edit Geometry* page also allows users to review specifications for individual roof members, and to view Eagleview’s aerial photographs of the job site.
- **Support** – Use this button to request help from the Roofing Passport Support Desk or provide feedback about Roofing Passport software.
- **Help** – Clicking on the `Help` button will open context-sensitive help information about the Roofing Passport page you are currently on.

The Properties Pane

On the right-side of the *Edit Job* page, the *Properties Pane* provides a series of tabs containing individual fields of job-specification information divided by topic. Taken collectively, the fields in the *Properties Pane* define every aspect of a job. The contents of the *Properties Pane* are identical in *3D View Mode*, *Job Review Mode* and *Drawings Mode*. In *Advanced Edit Mode*, the fields in the *Properties Pane* are restricted to a subset of information that pertains to the selected roof plane. In *Bids Mode*, the *Properties Pane* is not present.

The following is provided as a high-level description of the four tabs contained within the *Properties Pane*. For more detailed information about the tabs in the *Properties Pane* and their contents, please see the help information provided directly within the application.

- **Basic Tab** – As the name implies, the *Basic* tab contains essential information about a job, including the gauge, size and color of the metal to be used, labor estimates, and labor and material markups. Click [here](#) to learn more about the *Basic* tab.
- **Job Tab** – The *Job* tab contains basic administrative information about a job, including everything from the project name, location and invoice number, to contact information and key dates associated with the job. The information contained in the *Job* tab is customizable and varies greatly among different organizations. Click [here](#) to learn more about the *Job* tab.
- **Advanced Tab** – The *Advanced* tab is used to define and edit a host of properties associated with Colors, Sheathing, Roof Trim, Extra Trim Parts, Extra Sheathing Parts, and Trim Margins for your job. Click [here](#) to learn more about the *Advanced* tab.
- **Packages Tab** – The *Packages* tab is used to define optional materials for a job. There are four potential package types: *Add-ons*, *Bundles*, *Base Macros* and *Options*. Each organization will have its own unique collection of packages. Click [here](#) to learn more about the *Packages* tab.

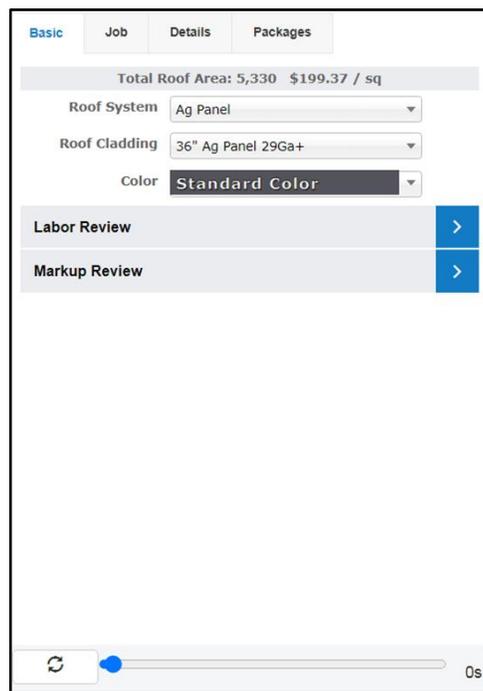


Figure 4: The four tabs at the top of the *Properties Pane*.

NOTE – The tabs and fields provided in the *Properties Pane* are identical in *3D View*, *Job Review* and *Drawings Mode*. In *Advanced Edit Mode*, only the *Details* tab is available. There is no *Properties Pane* associated with *Bids Mode*.

3D View Mode

The *Edit Job* page opens in *3D View Mode* by default. The *Display Pane* in *3D View Mode* provides a variety of information and perspectives from which to view a roof. The principle tasks that can be accomplished in *3D View Mode* include the following:

- View a three-dimensional model of your roof from any perspective
- Review dimension totals for each category of roof section
- Review dimension and slope numbers for each individual roof plane.
- View and edit the color(s) to be used for a roof
- Visually review how changes to a job's specifications affect the roof

Figure 5 below highlights some of the key areas of interest on the *Edit Job* page in *3D View Mode*. These are described later on in this section.

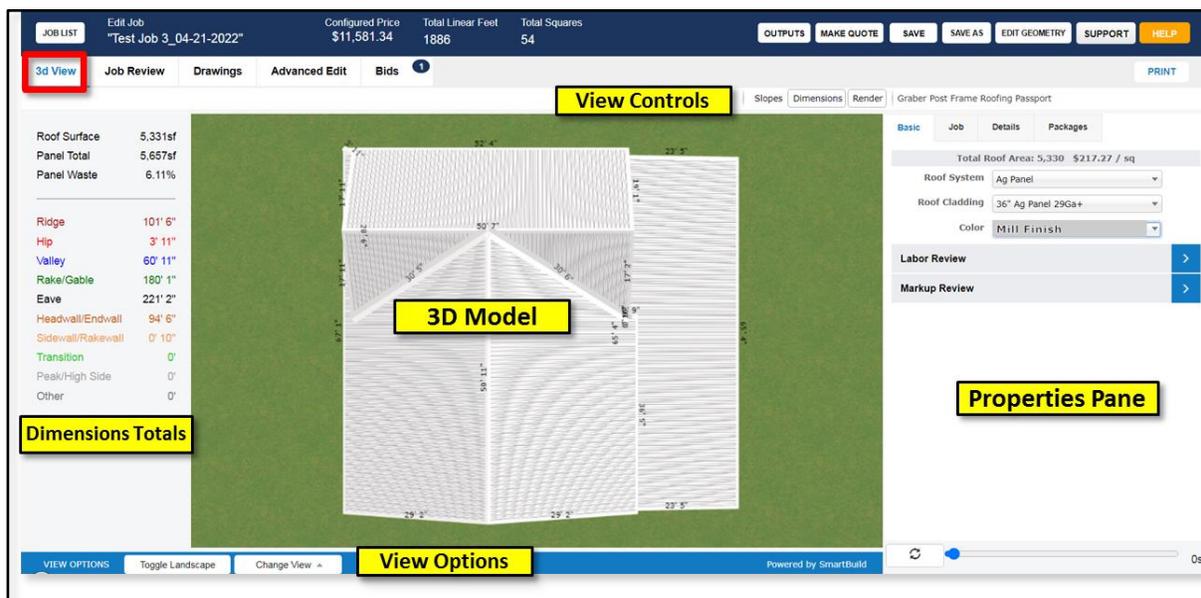


Figure 5: Highlights of available features on the *Edit Job* page in *3D View Mode*.

Dimension Totals – In *3D View Mode*, the far left-hand side of the *Display Pane* provides *Dimension Totals* for each different type of roof section. **NOTE** – the colors used in the *Dimension Totals* display correlate with the colors used in the 3D line drawing, as shown in **Figure 6**. These totals are not included when the contents of the *Display Pane* are printed.

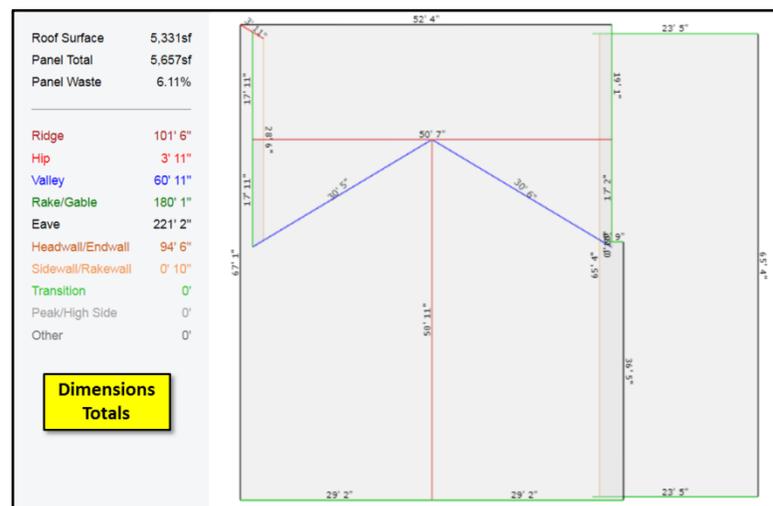


Figure 6: *Dimension Totals* (left) correlate with the colors used in the 3D line drawing (right).

3D View Mode *(continued)*

3D Model – The right side of the *Display Pane* presents a 3D model of your entire roof. The *View Controls* pictured in **Figure 7** are used to alter the perspective and data provided, as described under *View Controls* below.

View Controls – In *3D View Mode*, the *Edit Job* page includes four different *View Controls* for altering the perspective of, and data content in, the *Display Pane*.



Figure 7: Alter the 3D display using *View Controls*.

Slopes – Click on the *Slopes* button to toggle slope data for each roof plane on and off.

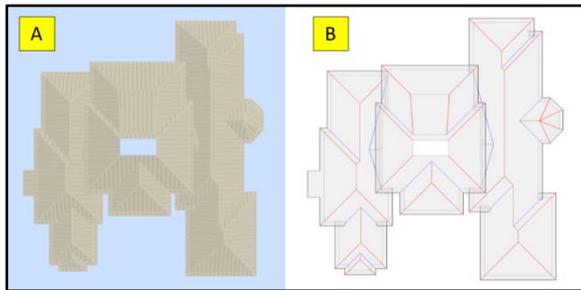


Figure 8: 3D virtual and line-drawing renderings of a model.

Dimensions – Click on the *Dimensions* button to toggle the roof's dimensions data on and off.

Render – Click the *Render* button to toggle back and forth between a 3D virtual rendering of your roof model (**Figure 9A**) and a 3D line drawing (**Figure 9B**). Both slope and dimensions data can be toggled on and off, regardless which of these two views is rendered.

View Options

Toggle Landscape – As pictured in **Figure 9** at right, the *Toggle Landscape* button changes the view between a black background and a green landscape background.

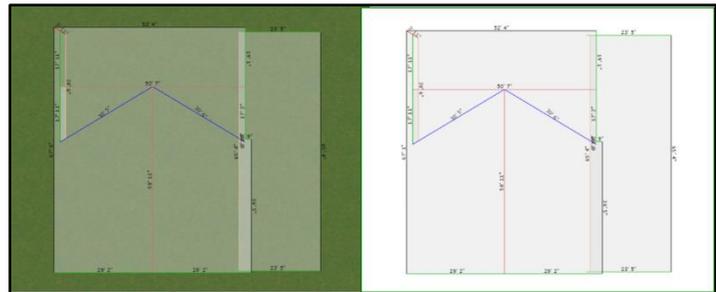


Figure 9: View Landscape on, left. View Landscape off, right.

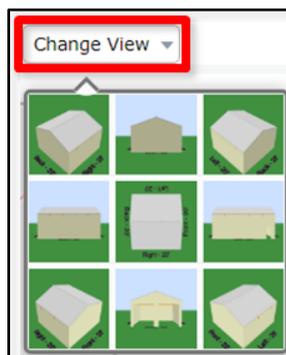


Figure 10: Nine options in the *Change View* drop-down.

Change View – The *Change View* drop-down list provides nine different preconfigured perspectives from which to view your model, including: Back Right, Back Elevation, Back Left, Right Elevation, Plan View, Right Elevation, Front Right, Front Elevation and Front Left. Plan View is displayed by default when the *3D View* page is first opened.

Click [here](#) for additional information about using the *Edit Job* page in *3D View Mode*.

Job Review Mode

The *Edit Job* page's *Job Review Mode* provides users with summary information about the materials, labor and freight required for a job. In addition, *Job Review Mode* also provides detailed information about every piece of sheathing, trim and accessories required for the roof. When you are editing a job, *Job Review Mode* is used to:

- Review a summary of the job pricing by category, including sheathing, trim, accessories, labor, freight and taxes
- Review comprehensive lists of all sheathing, trim and accessories to be used, with detailed specifications for each line item
- Review the calculated labor requirements for a job, including a breakdown by specific job assignment
- Review freight charges associated with a job
- Make changes to a job's specifications using fields in the *Properties Pane*
- Add new materials to a job from your catalog
- Add miscellaneous (non-catalog) items to a job

Figure 11 below highlights some of the key areas of interest on the *Edit Job* page in *Job Review Mode*.

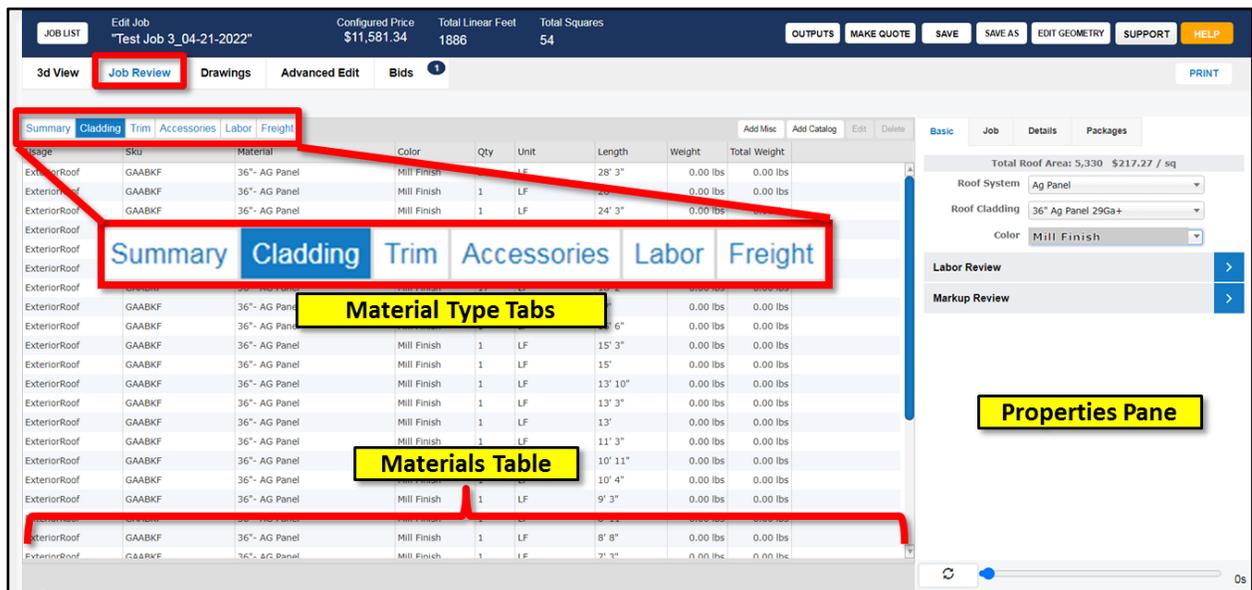


Figure 11: The *Edit Job* page in *Job Review Mode*.

The various sections and functions of *Job Review Mode*, as pictured in Figure 10, are defined as follows:

- **Materials Tabs** – The six *Materials Tabs* allow the user to select the specific category of materials or services to be reviewed. **NOTE** – The *Summary* tab is only visible to users who have been granted the “*See Pricing*” permission by their System Administrator. (See Figure 11 on the following page.)

Job Review Mode *(continued)*

- **Materials Table** – Each tab contains a comprehensive *Materials Table* with a list of the materials or services associated with the selected tab.
- **Properties Pane** – The *Properties Pane* contains categories and fields of information that, taken collectively, define all specifications for a job. Any changes made to data in the *Properties Pane* will be immediately reflected in the information shown in the *Display Pane*.

NOTE – The pricing and weight information displayed on the *Summary* tab is only visible to individuals who have been granted the See Pricing permission by their System Administrator.

| Summary | Cladding | Trim | Accessories | Labor | Freight | | |
|-------------------|----------|------|-------------|--------|---------|-------------|------------|
| Cladding | | | | | | \$7,051.58 | 0.00 lbs |
| Trim | | | | | | \$1,872.29 | 0.00 lbs |
| Accessories | | | | | | \$1,899.81 | 181.00 lbs |
| Labor | | | | | | \$0.00 | 0.00 lbs |
| Freight | | | | | | \$0.00 | 0.00 lbs |
| Taxable Total | | | | | | \$10,823.68 | |
| Sales Tax | | | | 7.000% | | \$757.66 | |
| Non-taxable Total | | | | | | \$0.00 | |
| Grand Total | | | | | | \$11,581.34 | 181.00 lbs |

Figure 12: Users must be granted permission to see the *Summary* tab and its contents in *Job Review Mode*.

Click [here](#) for additional information about using the *Edit Job* page in *Job Review Mode*.

Drawings Mode

The *Edit Job* page's *Drawings Mode* provides users with a comprehensive set of *Elevation*, *Roof Layout* and *Sheathing Layout* (i.e. panel) drawings for a job. The drawings are presented in read-only format, however, any edits made to a job's specifications in the *Properties Pane* while in *Drawings Mode* will be reflected in the drawings. When you are editing a job, *Drawings Mode* is used to:

- Review *Roof Layout*, *Elevation* and *Sheathing* (panel) drawings
- Review the material specifications for each individual panel, along with its associated trim
- Identify the location of individual pieces within their host panel, as well as the detailed properties of each piece (*SKU*, *Label*, *Quantity*, *Length*, etc.)
- Make changes to a job's specifications using fields in the *Properties Pane*

Figure 12 below highlights some of the key areas of interest on the *Edit Job* page in *Drawings Mode*.

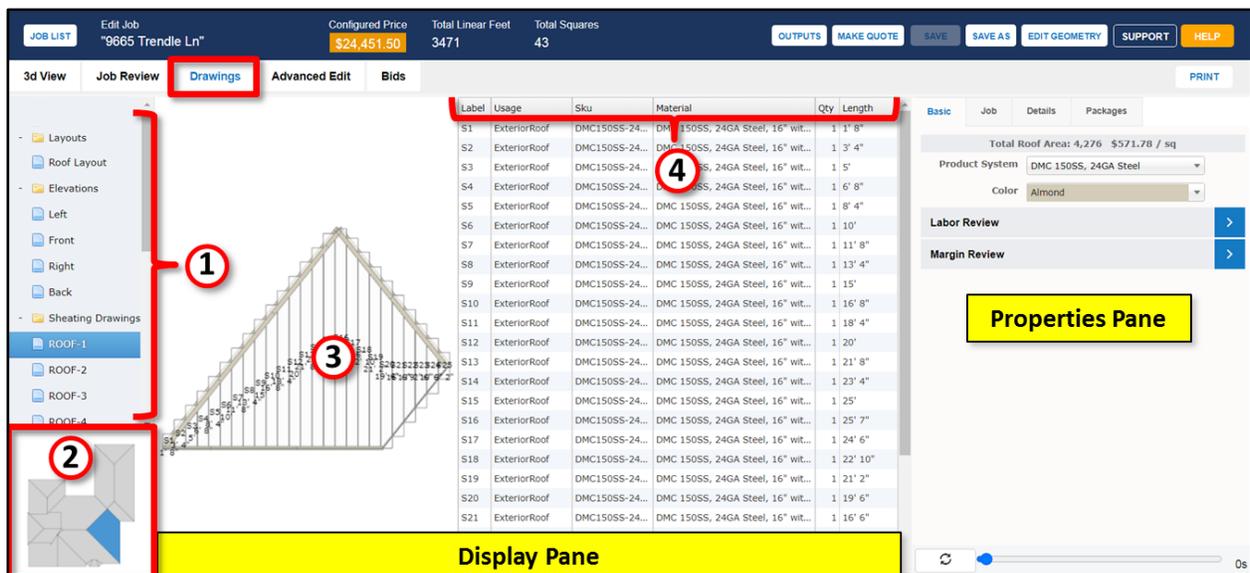


Figure 13: The *Edit Job* page in *Drawings Mode*.

The various sections and functions of *Drawings Mode*, as pictured in **Figure 12**, are defined as follows:

1. **Drawings Menu** – The *Drawings Menu* provides a list of all available line drawings for a job, including a single drawing for the layout of the entire roof, as well as a separate drawing for the sheathing of each individual roof plane.
2. **Panel Indicator** – The *Panel Indicator* shows the location of the roof panel that has been selected in the *Drawings Menu*, in relation to the entire roof.

Drawings Mode *(continued)*

3. **Line Drawing** – The *Line Drawing* in the *Display Pane* is a detailed rendering of the entire roof, or of an individual roof plane, depending on the selection that has been made in the *Drawings Menu*. If an individual roof plane has been selected, the drawing will include the label and dimension of each individual sheathing panel. If the *Roof Layout* drawing has been selected, the drawing will include the numeric label assigned to each roof plane, as well as the slope.
4. **Material Specifications** – If an individual roof plane has been selected in the *Drawings Menu*, in addition to the line drawing of that plane, the *Display Pane* will also show a read-only table of the specifications for all materials required for that section of roof.

Click [here](#) for additional information about using the *Edit Job* page in *Drawings Mode*.

Advanced Edit Mode

The *Edit Job* page's *Advanced Edit Mode* provides users with a roof layout drawing and a complete set of panel layout drawings. *Advanced Edit* is the only *Mode* that allows users to make changes to the properties of individual roof panels. The panel properties that can be changed using *Advanced Edit Mode* are grouped by category, and include Colors, Sheathing, Roof Trim, and Trim Margins. When you are editing a job, *Advanced Edit Mode* is used to:

- Change the color of one or more roof panels and/or trim
- Change the metal, margins, start and/or offset of individual sheathing panels
- Change individual panel trim for Ridge and Hip Caps, Valleys, Transitions, Eaves, Gables, and more
- Change Trim Margins for some or all different sections of a roof

Figure 13 below highlights some of the key areas of interest on the *Edit Job* page in *Advanced Edit Mode*.

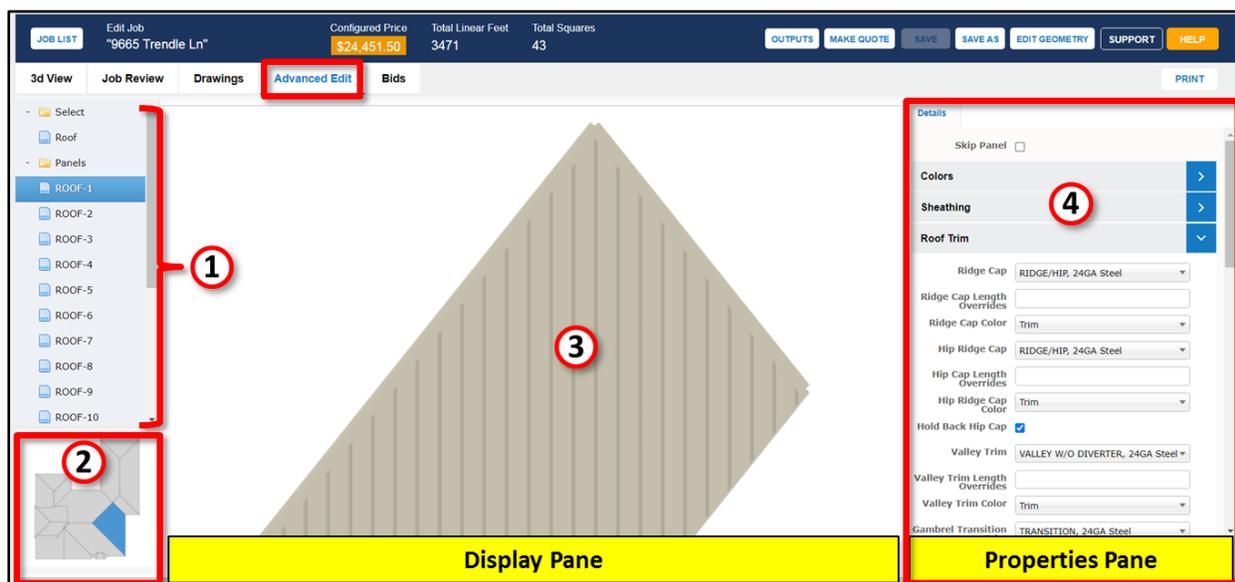


Figure 14: The *Edit Job* page in *Advanced Edit Mode*

The various sections and functions of *Advanced Edit Mode*, as pictured in Figure 13, are defined as follows:

1. **Roof and Panels Menu** – The *Roof and Panels Menu* provides a list of all available drawings for a job, including a single line drawing for the layout of the entire roof, as well as a separate 3D-virtual drawing for the sheathing of each individual roof plane.
2. **Panel Indicator** – The *Panel Indicator* shows the roof, or the location of the roof section that has been selected in the *Roof and Panels Menu*.

Advanced Edit Mode *(continued)*

3. **Drawing** – By default, when *Advanced Edit Mode* is selected, the *Display Pane* provides a *Line Drawing* of the entire roof. When an individual roof plane is selected in the *Drawings Menu*, a 3D rendering of the selected roof plane is displayed.
4. **Properties Pane** – Unlike the other *Modes* on the *Edit Job* page, in *Advanced Edit Mode* the *Properties Pane* has only one tab – the *Details* tab. Contents of the *Details* tab are limited to the material specifications relevant to the selected panel (i.e. roof plane). In addition, in *Advanced Edit Mode* the top of the *Properties Pane* includes the `Skip Panel` checkbox, which is not available in any other *Mode*. (Figure 14 at right.) Place a checkmark in the `Skip Panel` checkbox if you wish to remove all metal sheathing and trim from the selected roof plane. The roof plane itself will remain as part of your model, however, all associated sheathing and trim will be removed from your *Materials List*. You may wish to use this function if, for example, a section of roof is to be excluded from a job due to the fact that it is covered in a different type of material.

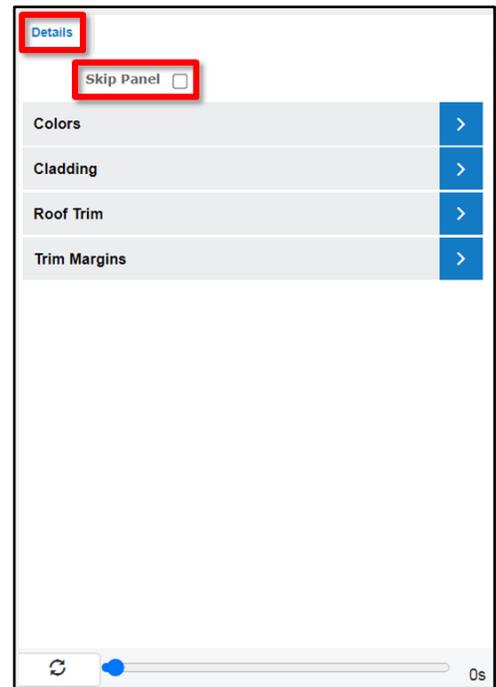


Figure 15: the `Skip Panel` checkbox is only available in *Advanced Edit Mode*.

Click [here](#) for additional information about using the *Edit Job* page in *Advanced Edit Mode*.

Bids Mode

Roofing Passport's *Bids Mode* allows you to create multiple alternative bids "on the fly." This is useful if you would like to see how adjustments to the *Price* and/or *Quantity* of any line item would affect your bid. **Figure 15** (below) shows how the *Bids Mode* page appears when first opened.

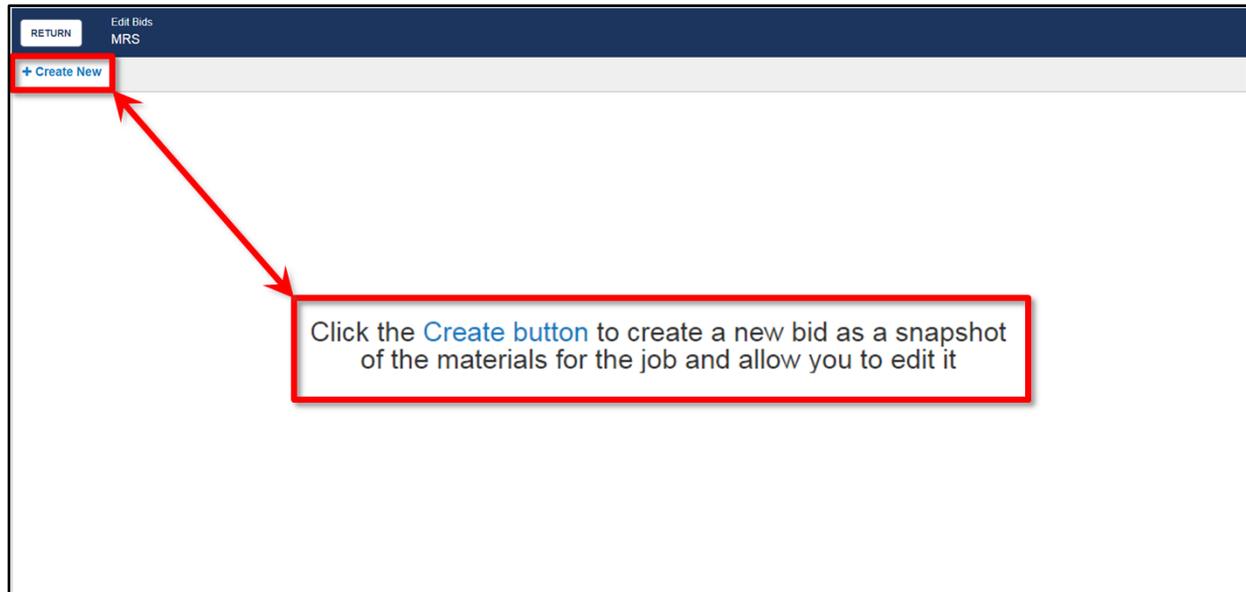


Figure 16: The *Bids Mode* page as it appears when first opened.

When you click on the *Create New* button, the dialog box pictured in **Figure 17** will open. Enter an appropriate name for your new bid. In our example here, we are going to adjust the pricing of some of our materials for a job, so we will name our bid accordingly. Once you have entered a name, click on the *Create* button to close the dialog box and create your new bid.

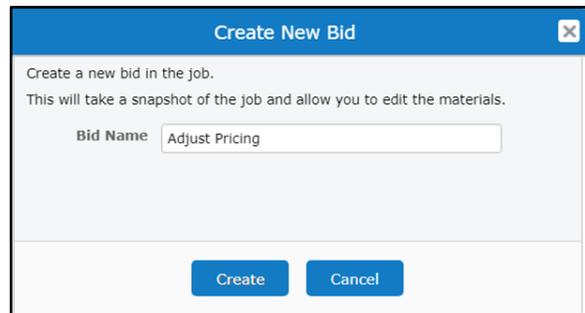


Figure 17: Enter a name for your new bid.

Bids Mode *(continued)*

As you can see in **Figure 17** (below), your new bid appears as a worksheet with a separate line item for each required material and service, **AS YOUR JOB IS CURRENTLY CONFIGURED IN THE MODEL**. The numbers in the *Quantity* and *Price* columns can be adjusted as needed to test out your new bid scenario. You cannot, however, add or delete any line items to this list. Changes to a line item's *Price* and/or *Quantity* are automatically reflected in the *Total Price* column, and also in the *Taxable Total*, *Sales Tax* and *Non-Taxable Total* lines at the bottom of the page.

| Sku | Material | Color | Angle | Qty | Unit | Length | Price | Total Price | |
|--------------------|--|-------------|---------|------|------|-------------------------|----------|-------------|----------|
| DMC100NS-24G-16-SX | DMC 100NS, 24GA Steel, 16" without Sealant | Aged Bronze | | 1840 | SF | Details | \$2.18 | \$4,011.20 | |
| EAVE-24G-10-Sx | EAVE, 24GA Steel | Aged Bronze | 102 deg | 8 | Each | 10' | \$29.56 | \$236.48 | |
| RAKE-24G-10-Sx | RAKEWALL, 24GA Steel | Aged Bronze | 97 deg | 1 | Each | 10' | \$50.84 | \$50.84 | |
| GABLE-24G-10-Sx | GABLE, 24GA Steel | Aged Bronze | 90 deg | 14 | Each | 10' | \$36.70 | \$513.80 | |
| RAKE-24G-10-Sx | RAKEWALL, 24GA Steel | Aged Bronze | 90 deg | 1 | Each | 10' | \$50.84 | \$50.84 | |
| RC-24G-10-Sx | RIDGE/HIP, 24GA Steel | Aged Bronze | 156 deg | 4 | Each | 10' | \$30.42 | \$121.68 | |
| TRAN-24G-10-Sx | TRANSITION, 24GA Steel | Aged Bronze | 171 deg | 5 | Each | 10' | \$34.30 | \$171.52 | |
| CLEAT-24G-10-Sx | CLEAT, 24GA Steel | Aged Bronze | | 8 | Each | 10' | \$5.35 | \$42.80 | |
| CTRFL-24G-10-Sx | COUNTER FLASHING, 24GA Steel | Aged Bronze | | 2 | Each | 10' | \$16.08 | \$32.16 | |
| CLEATG1-24G-10-Sx | GABLE CLEAT 1", 24GA Steel | Aged Bronze | | 13 | Each | 10' | \$10.69 | \$138.97 | |
| CLEATO-24G-10-Sx | OFFSET CLEAT, 24GA Steel | Aged Bronze | | 13 | Each | 10' | \$8.03 | \$104.39 | |
| ZEE1-24G-10-Sx | Z-CLOSURE 1", 24GA Steel | Aged Bronze | | 28 | Each | 10' | \$8.03 | \$224.84 | |
| 8000 | TAPE BUTYL DB 3/16"x7/8"x40', Butyl | | | 10 | Each | | \$5.66 | \$56.60 | |
| 5000TRS | TUBE SEALANT - CLEAR, Poly | | | 4 | Each | | \$8.53 | \$34.12 | |
| 3002 | #10 - 13 x 1" PHW, Carb. Steel | | | 11 | Each | | \$10.83 | \$119.13 | |
| 4000XX | 1/8" #43 POP RIVET SS - PAINTED, SS | Aged Bronze | | 76 | Each | | \$21.89 | \$1,663.64 | |
| 13000 | METSHIELD HT UNDERLAYMENT 25Q, Bitumen | | | 11 | Each | | \$113.08 | \$1,243.88 | |
| LBR | Labor Man Hours | | | 6 | | | \$20.00 | \$120.00 | |
| LIF04 | Minimum Setup Charge (Less than 50 SQS) | | | 1 | Each | | \$250.00 | \$250.00 | |
| Taxable Total | | | | | | | | \$9,066.89 | |
| Sales Tax | | | | | | | | 8% | \$725.35 |
| Non-taxable Total | | | | | | | | \$120.00 | |

Figure 18: Adjust the *Quantity* and/or *Price* numbers for line items to create an alternative bid scenario.

You can create as many alternative bids as you would like, testing out a variety of “what if” scenarios. Each unique bid will have its own tab at the top of the *Bids Mode* window. When a new bid is created, the line items and their quantities and prices reflect your model as it is currently configured. That is to say, the bids DO NOT affect one another, and you cannot create a new bid based upon an existing bid.

IMPORTANT! It is extremely important to remember that a bid created in *Bids Mode* **IS NOT** in any way tied to your Roofing Passport model or the *Materials List* associated with that job. *Bids Mode* is strictly used to create ‘what if’ to quickly review the implications of proposed changes. **If you elect to submit a bid with numbers that have been generated using *Bids Mode*, YOU MUST return to the *Properties Pane* on the *Edit Job* page to make the necessary changes.**

Click [here](#) for additional information about using the *Edit Job* page in *Bids Mode*

Editing a Job Before Quoting

When you create a new job using Roofing Passport, the model that is automatically generated uses the default configuration options specified by your System Administrator. Before sending out a bid to your customer, you will likely need to make changes to some of these default settings. Using Roofing Passport, you have precise control over every aspect of your job. Here are a few commonly implemented changes you can perform to get started with the editing process:

Changing Metal Color

To change the specified color for an *entire* job (both panels and trim), perform the following actions:

1. From your homepage, locate the desired job on your *Jobs List*, and click on the *Edit* button to the left of that job.
2. By default, your job will open in *3D View Mode* on the *Edit Job* page. Stay in *3D View Mode* so that you can see how the color changes you are about to make are reflected in your model.
3. In the *Properties Pane* on the right side of your window, you will see that the *Basic* tab is already selected by default. This is the tab we will use to change the metal color for the entire job.
4. On the *Basic* tab, click on the drop-down arrow in the *Color* field, as pictured in **Figure 18**. Note that the colors that appear in your drop-down list have been customized to meet the needs of your organization, so they will differ from the colors shown here.
5. From the *Color* drop-down list, click on the desired new color to select it, and watch as the color of your model automatically updates in the *Display Pane* at the left.
6. In the *Page Header* at the top of the page, be sure to click on the *Save* button to save your new color. That's it. In addition to changing the color of your model, Roofing Passport will automatically update all materials in your *Materials List* to reflect the change you have made.

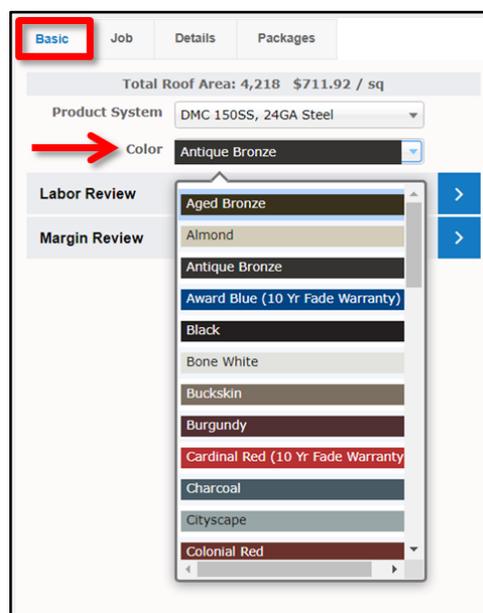


Figure 19: Selecting a new color from the *Color* drop-down list.

Changing Metal Product

To change the metal product specified for your job, perform the following actions:

1. From your homepage, locate the desired job on your *Jobs List* and click on the *Edit* button to the left of that job.
2. By default, your job will open in *3D View Mode* on the *Edit Job* page. Click on the *Job Review Mode* button and select either the *Sheathing* or the *Trim* tab so you can see how the metal changes you are about to make are reflected in your *Materials List*.
3. In the *Properties Pane* on the right side of your window, you will see that the *Basic* tab is selected by default. This is the tab we will use to change the metal for the entire job.
4. On the *Basic* Tab, click on the drop-down arrow in the *Product System* field, as pictured in **Figure 19**. Note that the metal options that appear in your drop-down list have been customized to meet the needs of your organization, so they will differ from the metal options shown here.
5. From the *Product System* drop-down list, click on the desired new metal to select it, and watch as the materials are automatically updated in the *Display Pane* at the left.
6. In the *Page Header* at the top of the page, be sure to click on the *Save* button to save your new metal selection.

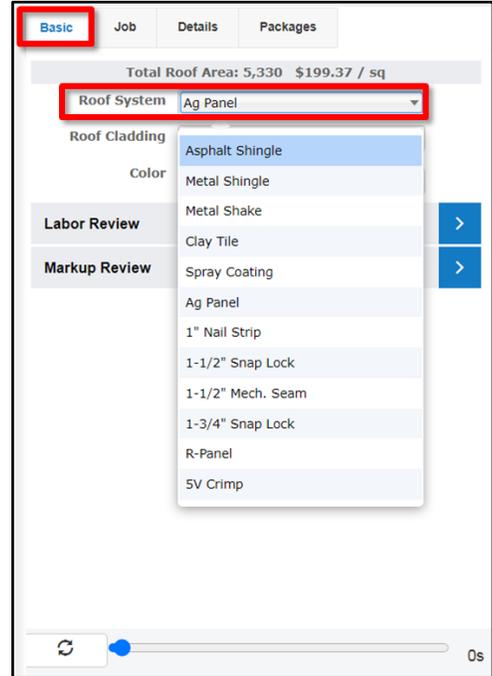


Figure 20: Selecting a new metal type (*Product System*) for your roof.

Downloading Documents

You can download drawings, material takeoffs, quotes or any job document from almost any location within the Roofing Passport application. To download documents, perform the following actions:

1. If you are on your homepage, locate the desired job on your *Jobs List* and click on the *Outputs* button to the left of that job. If you are on the *Edit Job*, *Prep Job* or *View Job* page, click on the *Outputs* button at the top of the page, on the right side of the *Page Header*.
2. A *Download Outputs* dialog box will open, similar to the one pictured in **Figure 20** at right.
3. Locate the document(s) you wish to download, and place a checkmark in the associated checkbox(es) by clicking on it/them with your mouse. Note, if you select multiple documents, they will be downloaded as a zip file.
4. Once you have selected the desired document(s), click on the *Download* button at the bottom of the dialog box.
5. That's it. Open your downloaded documents from your browser, or navigate to the downloads folder on your computer and open the documents from there. Print or save your documents to a new location as preferred.

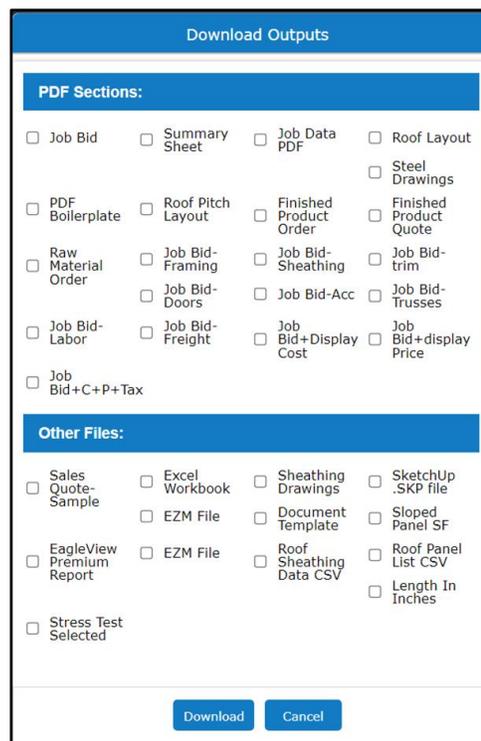


Figure 21: the *Download Outputs* dialog box.

Quoting and Preparing a Job for Order

Once you have edited a job and made all the necessary changes, you are ready to lock the job down for quoting purposes, and to prepare the job for order. To do so, perform the following actions:

1. On your homepage, locate the job you are ready to quote, and click on the *Make Quote* button to the left of that job. If you are already on the *Edit Job* page, you can click on the *Make Quote* button in the *Page Header* at the top of the page.
2. The dialog box pictured in **Figure 21** (right) will open, asking you to confirm that you are ready to lock down the materials and pricing for this job. Click on the *Yes* button. (Don't worry, you can always re-quote a job if changes need to be made after you have clicked on the *Yes* button.)

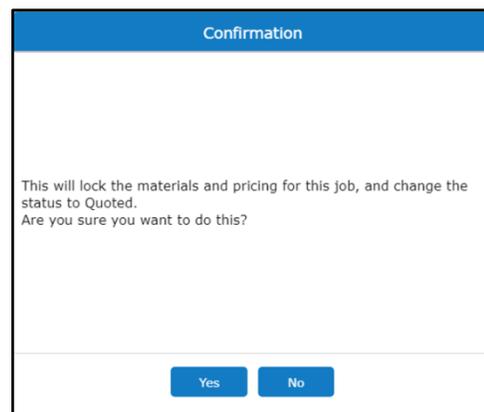


Figure 22: Click *Yes* in the *Confirmation* dialog box to lock down the job's materials and pricing.

(Continued on the following page.)

Quoting and Preparing a Job for Order *(continued)*

3. Once you click on the `Yes` button, the *Confirmation* dialog box will close, and you will be returned to your homepage. Notice on the *Jobs List* that your job's status has changed from `New` to `Quoted` and the `Edit` button has changed to `View`, since the job is now locked down.
4. Next, prepare your job for order by clicking on the `Prep for Order` button on the left.
5. The *Confirmation* dialog box pictured in **Figure 22** (right) will open. Click on the `Yes` button to close the dialog box and confirm that you are ready to prepare the job for order.
6. Back on your homepage, notice on the *Jobs List* that your job's status has now changed from `Quoted` to `OrderPrep` and the `View` button has changed to `Prep`.

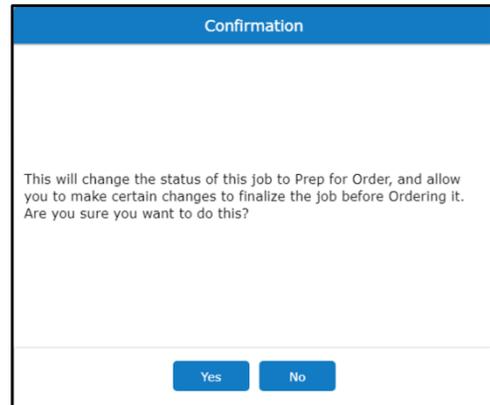


Figure 23: Click `Yes` to confirm that you are ready to prepare your job for order.

7. On your *Jobs List*, click on the `Prep` button to the left of your job. This will open your job on the *Prep Job* page. The *Prep Job* page allows you to make a limited number of final changes before placing your order. The changes that can be made on the *Prep Job* page include the following:
 - In *3D View Mode*, you can change the color of your entire roof on the `Basic` tab in the *Properties Pane*. **NOTE** – You will no longer be able to change the colors of sheathing and trim separately.
 - In *Job Review Mode*, you can change the `Quantity` of any material or service to be ordered. You can also add miscellaneous materials or materials from your catalog if needed.
 - In *3D View*, *Job Review* and *Drawings Mode* you can change the data entered on the *Job* tab in the *Properties Pane*.
 - In *Drawings Mode*, you can change the length of materials used for individual roof planes.
 - On the *Edit Geometry* page, you can use the `Fix All` function to automatically correct any identified issues with the job as it is currently configured.

(Continued on the following page.)

Quoting and Preparing a Job for Order *(continued)*

8. Once you have made all your desired changes, click on the `Make Order` button in the *Page Header* at the top of the page. The dialog box pictured in **Figure 23** (right) will open, asking you to confirm that you have read and agree to the Roofing Passport terms of service. Place a checkmark in the checkbox by clicking on it with your mouse, and then click on the `Accept` button.

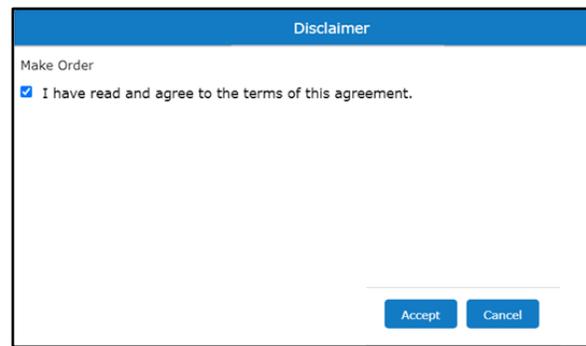


Figure 24: Click on the `Accept` button to change your job's status to *Ordered*.

9. Once you have clicked on the `Accept` button, you will automatically be returned to your homepage. Notice that the status of your job has changed from `OrderPrep` to `Ordered`, and the available *Action Buttons* to the left of your job now include both `View` (read only) and `Amend`. If you need to make changes *AFTER* your order has been placed, you can click on this `Amend` button to make a copy of your job with the materials and pricing unlocked for further editing.

Additional Support

We hope that this document has provided you with the information you need to get started with Sherwin-Williams Roofing Passport successfully. If you have any difficulty setting up or using Roofing Passport, please contact either of the following for additional support:

Sherwin-Williams – support-roofingpassport@sherwin.com

Roofing Passport – support@keymark.com