

Roofing Passport

System

Administrator's

Guide

for

Builders & Contractors

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Managing User Accounts

Roofing Passport is in the process of changing its user-creation process. Therefore, for the moment, we will show you how to access the *User Administration* page and use it to review the status of your users and manage their permissions. We ask that, for the time being, you **DO NOT** use the Add button to create new user accounts, even though this button remains available. We will publish the new user-creation process immediately after it is implemented.

System Administrators can access Roofing Passport's user-management interface by clicking the Settings menu and selecting the Users option from the drop-down list, as pictured in **Figure 1** at right.

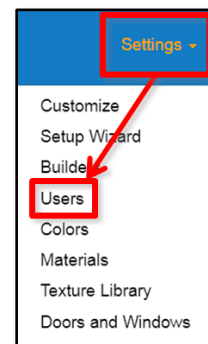


Figure 1: Opening the *Users Admin* page.

Parts of the Users Page

When you click on Users from the Settings menu, a Roofing Passport *Users Administration* page will open, similar to the one pictured below in **Figure 2**. As you can see, user information is presented in table format. Below is a list of a list of the columns available on the *Users* page, along with a brief

 A screenshot of the 'Users' page in the Roofing Passport system. The page has a blue header with navigation links: Home, Jobs, About, Contact, SUPPORT, Settings, Hello Video Dem..., and Log off. The main content area is titled 'Users' and contains a table of user accounts. A red box labeled '1' highlights the 'Command Toolbar' at the top of the table, which includes a search field, 'Add User', 'Delete', and 'Save' buttons. A red box labeled '2' highlights the 'Active' column in the table. A red box labeled '3' highlights the 'Download' button at the bottom left of the table. The table has columns: Full Name, User Name, Company Name, Email, Email Confir..., Active, Edit Mo..., View Distrib..., Edit Distrib..., Edit Mate..., Over..., View Adv..., Edit Pricing, See Pricing, and Created. The table lists 14 users, all from 'A1 Builders, Inc.'.

Full Name	User Name	Company Name	Email	Email Confir...	Active	Edit Mo...	View Distrib...	Edit Distrib...	Edit Mate...	Over...	View Adv...	Edit Pricing	See Pricing	Created
Jeremy Corbell	jcorbell	A1 Builders, Inc.	JEROME@G...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	2/1/2019, 9:26:53 A
Cindy Paletti	cpaletti	A1 Builders, Inc.	cpadgett@g...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5/7/2019, 11:51:47
Darrell Boinker	dboinker	A1 Builders, Inc.	darrell@GR...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6/19/2019, 10:21:25
Billy Bathgate	bbathgate	A1 Builders, Inc.	tfox@grabe...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1/22/2019, 8:57:06
John Barner	jbarner	A1 Builders, Inc.	dvaught@g...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	7/5/2019, 12:53:07
Will Smith	wsmith	A1 Builders, Inc.	ROYDEN@...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	11/27/2018, 12:33:1
Mary Muskrat	mmuskrat	A1 Builders, Inc.	rgraber@gr...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6/19/2019, 10:22:57
Phil Collins	pcollins	A1 Builders, Inc.	trent@grab...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3/11/2019, 11:22:26
Hal Puthoff	hputhoff	A1 Builders, Inc.	john@grab...	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	6/19/2019, 10:22:11
Tim Leary	tleary	A1 Builders, Inc.	jswartzentr...	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6/21/2019, 11:47:06

Figure 2: The System Administrator's interface for managing user accounts.

description of the function of each:

1. The *Users* page **Command Toolbar** provides quick access to the most commonly used functions for managing user accounts:
 - **Refresh** – Clicking on the Refresh button updates the list of accounts displayed on the *Users* page, to reflect any changes made since the last refresh operation.
 - **Search** – Use the Search field and button to locate user accounts based upon any word, or partial word, contained within the text fields in the *Users Table*.
 - **Add User** – Once again, we ask that you **DO NOT** create new user accounts by using the Add button at this time. For the moment, please contact the Roofing Passport Support Team if you need to create a new user account.

- **Delete** – Clicking on the `Delete` button will erase the selected user account from Roofing Passport. **NOTE** – If you attempt to delete a user account that currently has jobs assigned to it, you will receive the error message shown in **Figure 3** at right. All jobs assigned to the user must be reassigned before the account can be deleted.
- **Save** – Clicking on the `Save` button keeps all changes made on the *Users* page since the last `Save` operation.

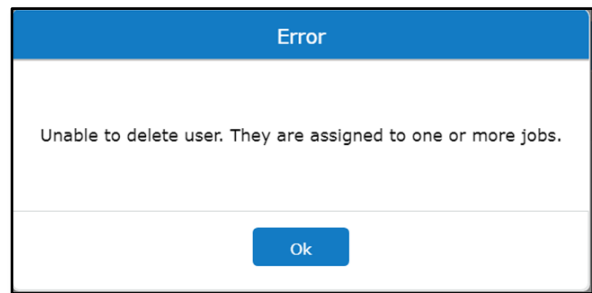


Figure 3: Error message when attempting to delete a user account with assigned job(s).

2. Columns in the **Users Table** parse all *User Account* information into its various components. (The information contained in each of these columns is explained in the section of this document immediately following.)
3. The **Server Response Time Indicator** displays the speed with which the Roofing Passport server is currently processing your commands within the interface.
4. The **Download** button is used to create a CSV file of all accounts in the *Users Table*.

Columns in the Users Table

Following is a complete list of all the columns found in the Roofing Passport *Users Table*, along with an explanation of their functions:

1. **Full Name** – This field is used to record the user’s first and last name. The data entered should be unique within the *Users Table*.
2. **User Name** – This is the name that the user will enter during the Roofing Passport login process. **NOTE** – as an alternative, the user’s email address can be used to log in.
3. **Company Name** – This is the name of the company to be associated with the new user account.
4. **Email** – This is the email address to be associated with the user’s Roofing Passport account. All Roofing Passport accounts are required to have a single, verified user account.
5. **Email Confirmed** – This field indicates whether or not the email account associated with the user’s Roofing Passport account has been confirmed. **NOTE** – You can temporarily prevent a user from logging in to Roofing Passport by unchecking the `Email Confirmed` checkbox.

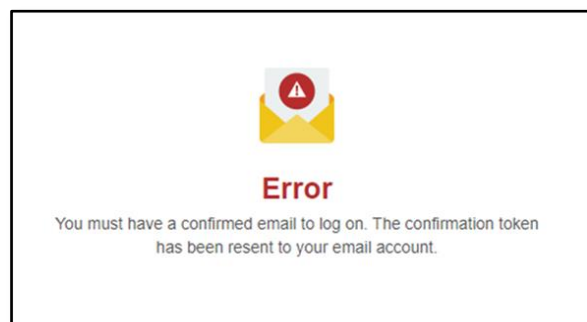


Figure 4: The error message received by users who attempt to log in with an unconfirmed email account.

6. **Active** – The `Active` checkbox is used to indicate whether or not a user account is currently operational. If there is no checkmark in this checkbox then, when the user attempts to log in, he or she will receive the error message shown in **Figure 5** at right.
7. **Edit Models** – When a checkmark is placed in the `Edit Models` checkbox, the user is granted access to modify the models displayed on his or her *Jobs* page. In addition, the following items will be visible on the user's *Home* page: his/her 10 most recent jobs, the "start from scratch" link, and the starting models.

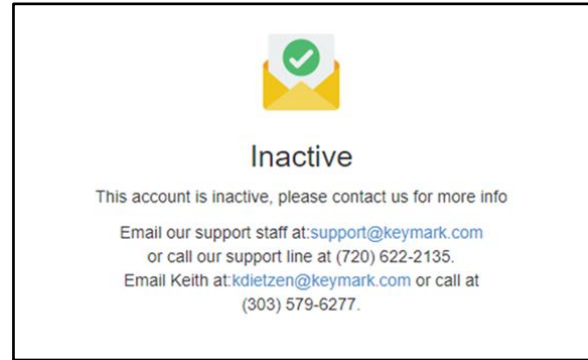


Figure 5: The error message a user receives when attempting to log in with an inactive user account.

8. **View Distributor Jobs** – If the `View Distributor Jobs` checkbox is activated, then the user will be able to view, edit, delete (etc.) all jobs created by other users within his company, as well as any jobs from child organizations. If this checkbox is unchecked, the user will only be able to see those jobs that he has created, along with any jobs created by others that have been assigned to him.
9. **Edit Distributor** – When a checkmark is placed in the `Edit Distributor` checkbox, the user will be granted access to view the `Settings` menu with the functions pictured in **Figure 6** at right. When this checkbox is unchecked, then the `Settings` menu and the associated options listed in **Figure 6** will be hidden from the user.
10. **Edit Material** – If a checkmark is placed in the `Edit Material` checkbox then, in addition to the menu items listed in **Figure 6** (above) the following functions will be added to the user's `Settings` menu: `Setup Wizard`, `Colors`, `Materials`, `Doors and Windows`, and `Span Tables`. Otherwise, these functions will remain hidden from the user's `Settings` menu. **NOTE** – If the `Edit Distributor` checkbox is unchecked, the `Settings` menu and all of its contents will remain hidden from the user - *even if the `Edit Material` checkbox is activated!*
11. **Override Errors** – If a checkmark is placed in the `Override Errors` checkbox, then the user will be granted permission to change a job's status to `Quoted` even if there are errors associated with that job. If this checkbox is unchecked then, when the user attempts to change the status of a job with errors to `Quoted`, the user will receive the error message shown in **Figure 7** at right.



Figure 6: Settings menu when `Edit Distributor` is checked.

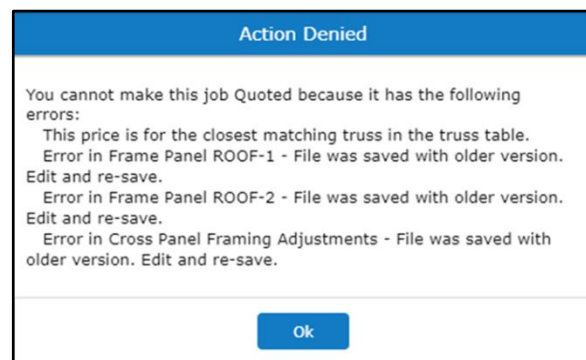


Figure 7: Error message displayed when the `Override Errors` checkbox is unchecked.

12. **Edit Pricing** – When this checkbox is activated (checked), the user will be granted permission to edit pricing information using the *Settings* menu *Pricing* function. **NOTE** – The user must also be granted the *Edit Distributor* permission, or the *Settings* menu will not be visible to him/her. If the user has been granted *Edit Distributor* rights, but the *Edit Pricing* checkbox is unchecked, then that user will be able to view pricing information but he/she will be unable to make any changes to that information.
13. **See Pricing** – When a checkmark is placed in the *See Pricing* checkbox, then the user will be able to see the pricing information displayed as the *Configured Price* on page headers, as well as the pricing information listed on the *Summary* tab in *Job Review Mode*. Left unchecked, this information will be hidden from the user.
14. **Created** – The date on which the user's Roofing Passport account was created.
15. **Activated** – The date on which the user confirmed his/her email address and his/her Roofing Passport user account made available.
16. **Last Accessed** – The date and time at which the user last logged in to Roofing Passport.
17. **Phone Number** – This is the telephone number entered by the user, or the Systems Administrator, at the time the user's account is created.

NOTE – Checkbox permissions are the only fields that can be edited directly from the *Users* administration page. All text-based fields must be edited using the fields under *Change Your Account Settings* on the *Manage* page. In addition, other than the *Email Confirmed* checkbox, all permissions checkboxes on the user's page are inactive (unchecked) by default. When checkbox permissions are changed and saved by the System Administrator, the affected user must log out and then log back in before the new permissions will become effective.

Setting Up Pricing Tables

Purpose

The purpose of this section is to provide System Administrators with the knowledge needed to set up *Pricing Tables* for their organization's materials, labor and freight. Roofing Passport will use these *Pricing Tables* to calculate accurate cost and price information for bids, quotes, material orders and other outputs.

Parts of the Pricing Window

To access your *Pricing Tables*, click on the **Settings** menu at the top of any page and select **Pricing** from the drop-down list, as pictured in **Figure 8** at right. This will open your *Pricing* page, similar to the one shown in **Figure 9** below. Note that there are three primary areas on this page that you will use to guide your work: the *Material & Service* tabs, the *Command Buttons* and the *Pricing Table Column Headers*. These are described as follows:

Material & Service Tabs – As you can see in the area highlighted in red in **Figure 9** (below) there are seven tabs on the *Pricing* page; five for materials (*Sheathing*, *Trim*, *Hardware*, *Connectors* and *Fasteners*) and two for services (*Labor* and *Freight*). When the time comes, you will click on each tab to open the *Pricing Table* for the associated items.

Command Buttons – There are three command buttons on the *Pricing* page (highlighted in yellow in **Figure 9**): **Margin**, **Upload** and **Download**. We will discuss each of these functions a little later in this document.

Column Headers – Each of the tables on your *Pricing* page contain the same 11 columns. As we will discuss later in this document, most of these columns will already contain data that has been entered by your Distributor/Supplier.

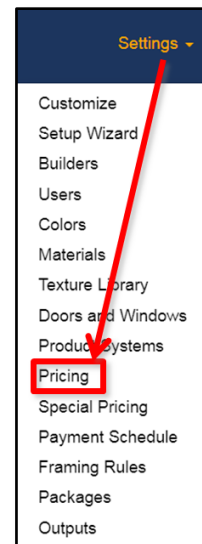


Figure 8: Select *Pricing* from the *Settings* menu.

A screenshot of the 'Prices for Custom Roofing, LLC' page. The page has a dark blue header with a logo on the left and navigation links (Jobs, About, Contact, SUPPORT) in the center. On the right, there are links for Settings, a user greeting (Hello tballaw.test!), and a Log off link. Below the header, the page title 'Prices for Custom Roofing, LLC' is displayed. Underneath the title, there are seven tabs: Sheathing, Trim, Hardware, Connector, Fastener, Labor, and Freight. The 'Sheathing' tab is selected and highlighted in red. To the right of the tabs is a red button labeled 'Material & Service Tabs'. Below the tabs, there are three yellow buttons: Margin, Upload, and Download. Below these buttons is a table with 11 columns: SKU, Vendor SKU, Material, Part Length, Color Code, Pricing Unit, Part Cost, Margin, Price, Taxable, and Weight. The table contains 10 rows of data. A green arrow points to the column headers of the table. At the bottom of the page, there is a status bar showing 'Server Response 2.93 sec' and '332-345 of 1,365 (buffered 1,365)'.

Figure 9: The three principal sections of the *Pricing* page.

ALTERING THE VIEW

To make your *Pricing Tables* easier to work with, you can change the view of any of the columns and their contents:

Resizing Columns – You can resize any of the columns in the table by bringing your mouse to hover over the target column header until your cursor changes to the resize symbol shown at right. Then simply click and drag your mouse to resize the column as desired.



Sorting Contents – You can sort the contents of a table from A to Z by clicking once on the desired column header. Click a second time to change the sort order from Z to A.

Columns and Their Contents

As mentioned previously, each of the seven different *Pricing Tables* contain the same 12 columns of information. The following is a description of each of these columns and their contents, broken down into three categories: Vendor Data Columns, Your Data Columns and Advanced Data Columns.

NOTE – The descriptions of *Vendor Data Columns* immediately below are to provide background information only. These columns DO NOT require any action on your part. There are only two columns of data that you are responsible for in each table; *Margin* and *Price*. Therefore, if you prefer, you can click [here](#) to skip down to the information about these two columns.

Sheathing	Trim	Hardware	Connector	Fastener	Labor	Freight						
							Margin	Price	Upload	Download		
SKU	Vendor SKU	Material	Part Length	Color Code	Pricing Unit	Part Cost	Margin	Price	Taxable	Weight	Lock ...	
DMC175S-32A-18-C1SG	DMC175S-32A-18-Sx	DMC 175S, .032" AL, 18" without Sea...			RandomLength	\$2.94	35.0%	\$4.52	1	0.922	<input type="checkbox"/>	
DMC175S-32A-18-C1ST	DMC175S-32A-18-Sx	DMC 175S, .032" AL, 18" without S...				\$2.94	35.0%	\$4.52	1	0.922	<input type="checkbox"/>	
DMC175S-32A-18-C1SV	DMC175S-32A-18-Px	DMC 175S, .032" AL, 18" without S...				\$3.06	34.9%	\$4.70	1	0.922	<input type="checkbox"/>	
DMC175S-32A-18-C1SW	DMC175S-32A-18-Sx	DMC 175S, .032" AL, 18" without S...				\$2.94	35.0%	\$4.52	1	0.922	<input type="checkbox"/>	
DMC175S-32A-18-C1TB	DMC175S-32A-18-Sx	DMC 175S, .032" AL, 18" without Sea...		C1TB	RandomLength	\$2.94	35.0%	\$4.52	1	0.922	<input type="checkbox"/>	
DMC175S-32A-18-C1TC	DMC175S-32A-18-Sx	DMC 175S, .032" AL, 18" without Sea...		C1TC	RandomLength	\$2.94	35.0%	\$4.52	1	0.922	<input type="checkbox"/>	
DMC175S-32A-18-C1WZ	DMC175S-32A-18-Px	DMC 175S, .032" AL, 18" without Sea...		C1WZ	RandomLength	\$3.06	34.9%	\$4.70	1	0.922	<input type="checkbox"/>	
DMC175S-32A-18-C1ZN	DMC175S-32A-18-Px	DMC 175S, .032" AL, 18" without Sea...		C1ZN	RandomLength	\$3.06	34.9%	\$4.70	1	0.922	<input type="checkbox"/>	
DMCSV-32A-21-C1AC	DMCSV-32A-21-Px	DMC 5V, .032" AL, 21" without Sealant		C1AC	RandomLength	\$2.81	35.0%	\$4.32	1	0.922	<input type="checkbox"/>	
DMCSV-32A-21-C1AGB	DMCSV-32A-21-Sx	DMC 5V, .032" AL, 21" without Sealant		C1AGB	RandomLength	\$2.69	34.9%	\$4.13	1	0.922	<input type="checkbox"/>	
DMCSV-32A-21-C1AL	DMCSV-32A-21-Sx	DMC 5V, .032" AL, 21" without Sealant		C1AL	RandomLength	\$2.69	34.9%	\$4.13	1	0.922	<input type="checkbox"/>	

Figure 10: *Margin* and *Price* are the only two columns that you need to complete in order to set up your *Pricing Tables*.

VENDOR DATA COLUMNS

For most *Pricing Tables*, your Distributor/Supplier will be responsible for populating the 10 columns shown in yellow in (Figure 10 above) with data. The contents of each columns is described as follows:

SKU – In order to generate highly detailed and accurate *Material Lists*, Roofing Passport uses its own special SKU code for each distinct material. Listed on the *Pricing Tables* as "SKU." This required column of data includes specific segments of code that allow Roofing Passport to differentiate among otherwise identical materials that are offered in a variety and Colors and/or precut Lengths.

Vendor SKU – The *Vendor SKU* column is used to list the SKU code your Supplier/Distributor uses to identify each unique piece of material in its inventory. The *Vendor SKU* column is optional, however, most *Suppliers* find it extremely helpful to map their Roofing Passport *Materials List Outputs* right back to the parts in their warehouse.

Material – This is the Supplier's/Distributor's brief, structured description of each material or service being offered. This field is required for all materials and services.

Part Length – This optional column of data is generally used to record the span of each material that is provided in pre-cut lengths. If a material is "cut to order", this field may be left blank.

Color Code – The *Color Code* is a short, unique identifier assigned by your Supplier/Distributor for every color in which a material is made available.

Pricing Unit – This is the designated quantity upon which the pricing for a material or service is based. For example, the *Pricing Unit* might be designated as "each" for materials that are sold individually, as "part length" for materials that are sold in specific pre-cut sizes, "per box" for things like rivets and connectors, "per hour" for labor, and so on.

Part Cost – This required column is used to record the price that your organization will pay your Supplier/Distributor for a single *Pricing Unit* of a given material.

Taxable – This required column indicates whether or not a given material is subject to federal, state or local taxes. (1 = taxable; 0 = nontaxable.)

Weight – This optional column represents the specific weight associated with a material's given *Pricing Unit*. If values are provided, these figures will be used to calculate the total shipping weight for each job.

YOUR DATA COLUMNS

As mentioned above, there are only two columns of data that you are responsible for populating in each of the seven *Pricing Tables*; *Margin* and *Price*. In fact, it is even easier than that. When you enter information in either column, Roofing Passport will automatically enter the required data in the other column for you. Read on for details.

Margin/Markup – Some Suppliers/Distributors name this column *Margin*, while others name it *Markup*. Either way, this column represents the additional percentage your company will charge the customer, over and above the *Cost* it pays to purchase each item from your Supplier/Distributor.

If you want to enter or change the *Margin/Markup* for multiple line items in a given table, simply select the desired items with your mouse and then click in the *Margin* command button on the toolbar. (See **Figure 12** on the following page.) This will open the *Edit Margin* dialog box pictured in **Figure 11** (above right). Type in your margin, as a percentage, using a single decimal point (e.g. 25.0%, 35.8%, etc.) When you are done, click on the **OK** button to close the dialog box. The percentage you entered will be applied to all the line items you have selected.

If you have not yet entered a value in the *Price* column, once you enter a value in the *Margin* column, Roofing Passport will automatically calculate the *Price* ($Cost \times Margin$), and enter that value in the *Price* column for you.

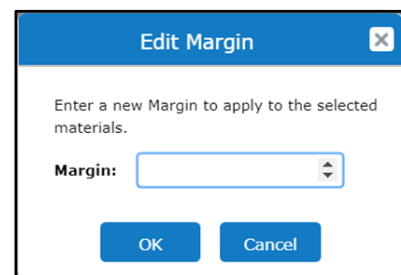


Figure 11: The *Edit Margin* dialog box.

Price – The *Price* column represents the fee you will charge the customer for each line item in your *Pricing Tables*. *Price* values must be entered one line item at a time. To enter or edit a *Price*, double click on the *Price* field for the desired line item, and enter your value as dollars and cents. Roofing Passport will automatically add the dollar-sign prefix for you.

If you have not yet entered a value in the *Margin* column, once you enter a value in the *Price* column, Roofing Passport will automatically calculate the *Margin* ($\text{Cost} / \text{Price} - 1.00$) and enter that value in the *Margin* column for you.

ADVANCED DATA COLUMNS

There are two columns that may or may not appear on your *Pricing Tables*; *Hide* and *Lock*. Both of these columns represent advanced functionality in Roofing Passport, and they lie beyond the scope of this introductory document. Neither column of data is required for you to get up and running successfully with Roofing Passport, so you can disregard them both as you are getting started.

Using the Download/Upload Functions

If you prefer to populate or edit the *Margin* and *Price* columns, or any other columns in your *Pricing Tables* using a CSV or Microsoft Excel (XLSX) file, you can download the existing data, make your changes, and then upload your completed file into the Roofing Passport database.

DOWNLOAD PROCESS

To begin, click on the **Download** button on the toolbar, as pictured in **Figure 12** at right. Select the desired file type from the drop-down list that appears. As soon as you select your file type, Roofing Passport will automatically download the file to your local computer. Simply open the file, make the needed changes, and then save the file to a location you can easily find it for the **Upload** process.

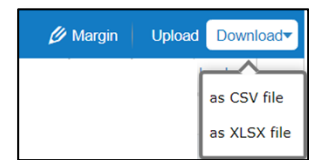


Figure 12: Select the type of file for your **Download**.

NOTE – All seven tabs of material and service data on your *Pricing* page will be included in a downloaded CSV or XLSX file. Likewise, uploading your completed CSV or XLSX file will populate the data on all seven tabs of information on the *Pricing* page.

UPLOAD PROCESS

Once you have made all the changes needed to your downloaded *Pricing* file, you will need to Upload the file to the Roofing Passport database in order to implement your changes. To begin, click on the Upload button on the toolbar on the *Pricing* page, as shown in **Figure 12** on the previous page. When you click on the Upload button, the dialog box shown in **Figure 13** at right will open.

The dialog box is titled "Upload" and "Upload Material Pricing for [Your Company Name]". It contains three steps: Step 1: Click [here](#) to download the current pricing as a CSV file. or: Click [here](#) to download the current pricing as an XLSX file. Step 2: Edit the material pricing csv file. Step 3: Upload the material pricing csv file. Below the steps, there is a "Choose File" button and a "No file chosen" text. At the bottom, there is an "Upload" button.

Figure 13: The *Upload* dialog box for your *Pricing* file.

The dialog box is titled "Upload" and "Upload Material Pricing for [Your Company Name]". It contains three steps: Step 1: Click [here](#) to download the current pricing as a CSV file. or: Click [here](#) to download the current pricing as an XLSX file. Step 2: Edit the material pricing csv file. Step 3: Upload the material pricing csv file. Below the steps, there is a "Choose File" button and a "Mater...ls.xlsx" text. At the bottom, there is an "Upload" button. A red box highlights the following message: "Your update is now processing. You will recieve an email at [your SmartBuild email address] when it is complete. Be sure to add 'SmartBuildFramerSupport@keymark.com' to your safe sender list so you dont miss it. **YOUR CHANGES ARE NOT SAVED UNTIL YOU GET THE EMAIL. DO NOT TRY TO MAKE ANY OTHER SETTINGS CHANGES UNTIL THEN!**"

Figure 14: Message posted in the Upload dialog box after upload process has been completed.

In the *Upload* dialog box, click on the *Choose File* button, and navigate to the location on your local computer where you have saved your CSV or XLSX file. Click on the file to select it. Now, back in the *Upload* dialog box, click on the *Upload* button. Once you do this, the bottom of the *Upload* dialog box will expand to present the message shown in **Figure 14** at left.

That is all there is to it. Be sure NOT to undertake any further changes to your Roofing Passport *Settings* until you have received the confirmation email announcing that your database has completed the upload process.

Setting Up Packages

Overview

As you likely know, Roofing Passport automatically models, measures, cuts and prices all of the sheathing and trim materials required for each job. But what about the other materials and services that may be required for a job? Materials like screws, closures and underlayment, and services like labor and freight? To include these items in your outputs, you must set up Roofing Passport packages.

Roofing Passport packages are a powerful tool that will allow you to estimate costs and pricing for all of the materials and services required for a job beyond basic sheathing and trim. Packages are a sophisticated tool, and you will need to work closely with the Roofing Passport Support Team to get them set up properly for your organization. The purpose of this document is to provide you with a high-level overview of this important feature, and thereby allow you to work effectively with the Support Team to get your packages created and configured properly. Topics to be covered in this document include:

- The function of packages and the role they play in calculating job costs and pricing
- The basic package types
- The Packages Administration interface; its parts and functions
- How to create a new package from scratch

DEFINITION – A Roofing Passport *package* is a defined set of material(s) and/or service(s) that are managed as a single unit and used to estimate the cost and pricing for a quote or order. *A package defines how the charges for these materials and services are to be calculated for each job.*

In Roofing Passport, packages are often created to manage materials such as Fasteners (Screws, Clips, Rivets), Closures (Ridge Cap, Eave Drip), accessories like Underlayment, Sealants, Paint Pens, and services such as Labor and Freight. As Systems Administrator, you are responsible for setting up and maintaining the packages to be used by your organization. Here are some things you should know:

- There is no limit to the number of packages that can be created
- Each package may include anything from a single material or service to many
- A package can be setup so that it is added automatically to each job
- A package can be setup so that your Roofing Passport users can select whether or not to include it on any given job
- The framework used for organizing and pricing the materials in your Materials Database will determine how package cost and pricing information are calculated

Package Types

There are four different types of Roofing Passport packages:

1. **Base Macro** – A *Base Macro* is a package that is automatically included in every job. Base Macro packages are used to calculate things such as the required number of screws and connectors. All *Base Macro* packages are invisible to Roofing Passport end users, and can neither be added nor deleted from a job by them.
2. **Add-on** – An *Add-on* is a type of package that users can choose to either 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. By default, Add-on packages are excluded from each job so, unless the Systems Administrator switches the default value to "on" users will need to activate the checkbox associated with that Add-on to include it.

3. **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.
4. **Option** – 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 include them as part 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 quote price.

NOTE – Any material or service can be configured as any one of the four *Package Types*. It is not the contents of the package that determines the *Package Type*, but rather the manner in which that material or service is to appear to your end users and on your outputs.

Table of Package Properties

The table below summarizes the properties associated with each of the four different *Package Types*. An explanation of each column name is provided immediately below the table:

Package Type	Automatic	Hidden / Visible	Default	User's Choice	Min # Line-Item
Add-On	No	Visible	On / Off	Yes	1+
Base Macro	Yes	Hidden	On	No	1+
Bundle	No	Visible	On / Off	Yes	2+
Option	No	Visible / Hidden	Option List / Bundle List / Hidden	Yes	1+

Automatic – Indicates whether or not the package is automatically included in each job, without the ability of end users to remove it.

Hidden/Visible – Indicates whether the package is visible or hidden to Roofing passport end users.

Default – By default, the package is "checked" for inclusion in each job; however, the end user has the ability to "uncheck" the package and exclude it from an individual job.

User's Choice – The package is made available to end users, who decide whether or not to include it in a given job.

The Packages Administration Interface

You will create, delete and modify packages using the Roofing Passport *Packages Administration* page. To access this page, from your homepage, click on the **Settings** menu and select **Packages**, as pictured at right in **Figure 15**.

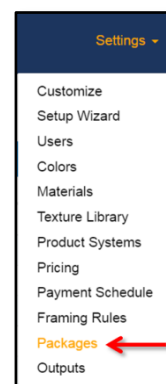


Figure 15: Accessing the *Packages Administration* page from the **Settings** menu.

An example of the *Packages Administration* page is shown in **Figure 16** below. As you can see, the left side of the page displays the *Packages List*; a complete list of the packages that have been created for your organization to date. When you click on any package in the *Packages List* to select it, the details for that package appear on the right-side of the window; the *Package Details* pane.

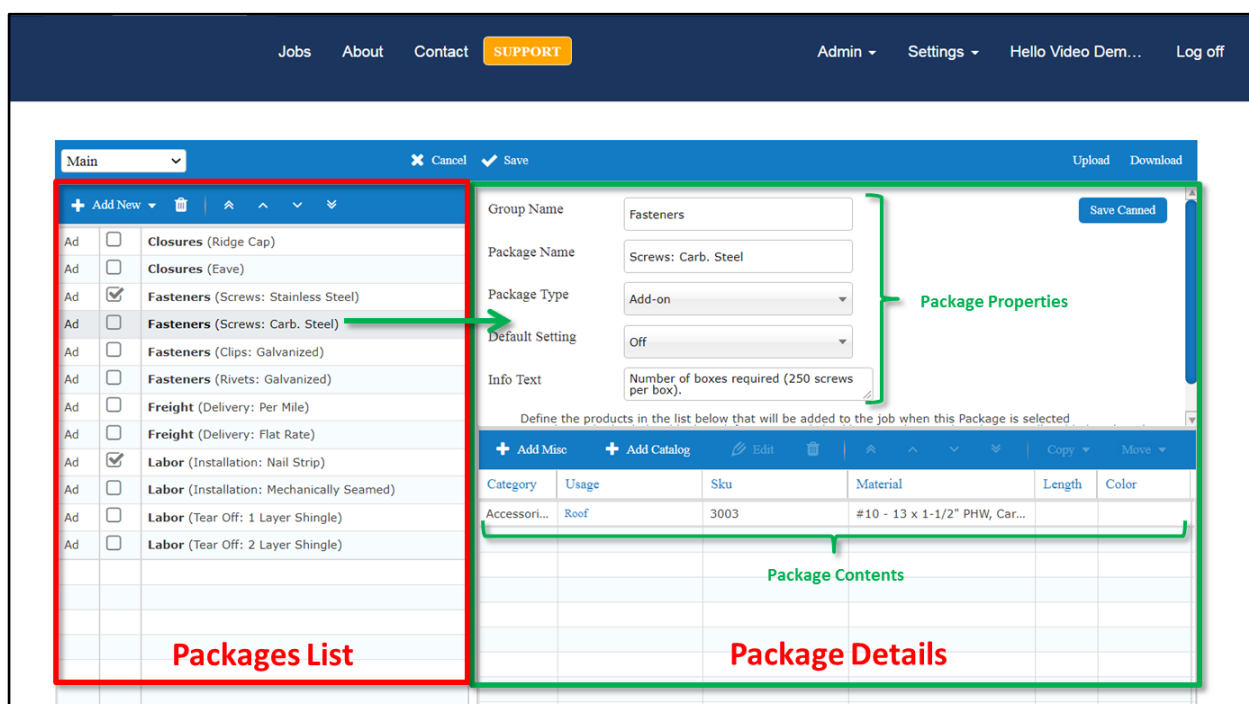


Figure 16: Parts of the Roofing Passport's *Packages Administration* page.

THE PACKAGES LIST

As you can see in **Figure 17** (right) the *Packages List* contains a toolbar along with three columns of information. The toolbar includes buttons for adding a new package or deleting an existing package, along with a series of arrows for changing the sort order of your list. The left-most column in the *Packages List* indicates the Package Type for each row. Within this column, the four package types are abbreviated as follows:

- Ad** – Add-on
- Ba** – Base Macro
- Bu** – Bundle
- Op** – Option

+ Add New		
Ad	<input type="checkbox"/>	Closures (Ridge Cap)
Ad	<input type="checkbox"/>	Closures (Eave)
Ad	<input checked="" type="checkbox"/>	Fasteners (Screws: Stainless Steel)
Ad	<input type="checkbox"/>	Fasteners (Screws: Carb. Steel)
Ad	<input type="checkbox"/>	Fasteners (Clips: Galvanized)
Ad	<input type="checkbox"/>	Fasteners (Rivets: Galvanized)
Ad	<input type="checkbox"/>	Freight (Delivery: Per Mile)
Ad	<input type="checkbox"/>	Freight (Delivery: Flat Rate)
Ad	<input checked="" type="checkbox"/>	Labor (Installation: Nail Strip)
Ad	<input type="checkbox"/>	Labor (Installation: Mechanically Seamed)
Ad	<input type="checkbox"/>	Labor (Tear Off: 1 Layer Shingle)
Ad	<input type="checkbox"/>	Labor (Tear Off: 2 Layer Shingle)

Figure 17: The *Packages List*.

The middle column on the *Packages List* indicates whether or not the package is to be included in each job by default. When the checkbox is activated (i.e. “checked”) then the package is included by default. Roofing Passport end users have the ability to uncheck this box when reviewing the packages to be included in each job (unless the *Package Type* is Base Macro, in which case the package is invisible to end users and will be included in all jobs automatically). The third column in the *Packages List* displays the *Group Name* for each package in bold font, followed by the *Package Name*.

PACKAGE DETAILS PANE

The *Package Details Pane* (**Figure 18** below) displays the properties and contents of the package selected in the *Packages List*. The buttons, fields and columns associated with the *Package Details* pane are described in detail later in this document in the section entitled [Using the Blank Template](#).

The screenshot shows the 'Package Details Pane' with a blue header bar containing 'Save', 'Upload', and 'Download' buttons. Below the header, there are five input fields for package properties: 'Group Name' (Fasteners), 'Package Name' (Screws: Carb. Steel), 'Package Type' (Add-on), 'Default Setting' (Off), and 'Info Text' (Number of boxes required (250 screws per box)). A green bracket on the right side of these fields is labeled 'Package Properties'. Below the properties section, there is a table titled 'Define the products in the list below that will be added to the job when this Package is selected'. The table has columns: Category, Usage, Sku, Material, Length, and Color. The first row contains the following data: Accessori..., Roof, 3003, #10 - 13 x 1-1/2" PHW, Car..., and empty cells for Length and Color. A green bracket below the table is labeled 'Package Contents'.

Figure 18: The *Package Details* pane displays the properties and contents of the package selected on the *Packages List*.

Creating a New Package

PREREQUISITES

There are some basic processes and planning that must take place before you jump into the process of creating your packages.

Materials Database – You will need to create packages for all the different types of products and services made available in your catalog. Therefore, before creating packages, make sure your *Materials Database* is in good order. That is, your materials have all been entered and properly categorized and priced. A poorly or inconsistently organized catalog will make package creation exponentially more difficult.

Pricing Units – Within your Roofing Passport database, materials are listed and sold in different pricing units. For example, sheathing may be sold by the square foot, trim by lineal foot, screws by the box, and sealant by the tube. When creating a package in Roofing Passport, you must be certain to understand how that material is priced within your catalog, in order to arrive at the correct calculation for your package.

QUESTIONS TO ASK

Before creating a new package, consider the following:

1. **Question** – *How do your end users tend to “think about” and classify the materials and/or services associated with the package you are about to create?*

Answer – Use the terminology that is commonly accepted in your workplace in order to make accessing and using packages an efficient process for your end users.

2. **Question** – *Is there an existing package that could serve as a template for the new package you want to create?*

Answer – If the answer is yes, then you can copy the product line-items from the existing package to the new package you are creating. (As of this writing, you cannot create a copy of an entire package.)

3. **Question** – *Do you want the package included automatically in every job while simultaneously prohibiting end users from removing or even seeing it?*

Answer – If yes, create a Base Macro Package. All *Base Macro* packages are included with every job automatically, and cannot be seen or removed by end users. (For example, many organizations automatically include the required fasteners for each job using a *Base Macro*.)

4. **Question** – *Should the package be assigned to a group?*

Answer – When you create a *Group Name*, all packages assigned that *Group Name* will appear in a drop-down list from which users can make their selection. (See **Figure 19**, right.) This is fast and effective if you have numerous different materials that belong to the same category (e.g. multiple screw types, lengths and/or colors, etc.) That said however, if a user might need to select more than one material from this category (e.g. 2” Screws AND 2 ½” screws then grouping these items together is the wrong solution, since a drop-down list is limited to the selection of a single item. If multiple selections are potentially required, DO NOT assign a *Group Name*, but instead use a naming convention in the *Package Name* field that will group these items together for ease of use. (e.g. Package Names: Screws 2”, Screws 2 ½ “, etc.)

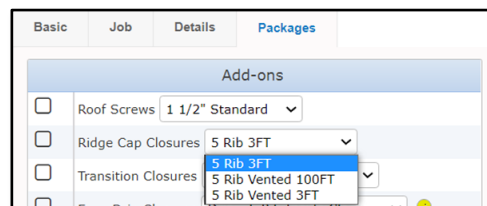


Figure 19: *Ridge Cap Closure* options grouped together and presented in a drop-down list for users.

PACKAGE WIZARDS

Roofing Passport includes two wizards for creating sophisticated packages that lie beyond the scope of this introductory document; the *Roofing Wizard* and the *Labor Wizard*. This introductory document is restricted to creating packages using the *Blank Template*, described immediately below.

USING THE BLANK TEMPLATE

To create a new package, from your Roofing Passport homepage, click on the **Settings** menu and select **Packages**. This will open the *Packages Administration* page, as shown below in **Figure 20** below. To create your new package, click on the **Add New** button and select **Blank** from the drop-down list. This will add a new package to the bottom of your *Packages List*, as shown in **Figure 20**. You will then fill out the *Package Properties* and *Package Contents* sections on the right of the window.

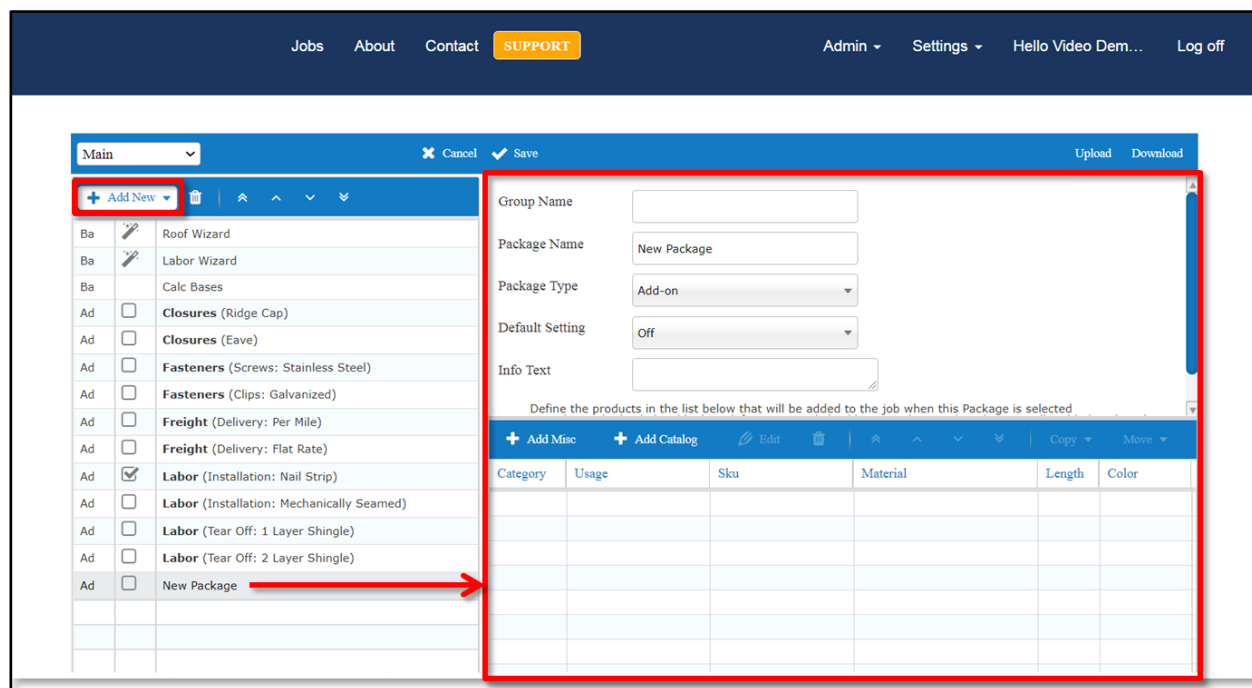


Figure 20: The *Package Details* pane when creating a new package using the *Blank* template.

To create our new package, you must complete the fields presented in the *Package Details* pane, beginning with the *Package Properties* fields at the top of the pane.

PACKAGE PROPERTIES

Group Name – The **Group Name** field is not required however, you should always add a **Group Name** if there are multiple packages that should be grouped together to make it easier for end users to find them in the interface. Packages that share the same **Group Name** will appear together in a drop-down list, as shown in **Figure 21** at right.

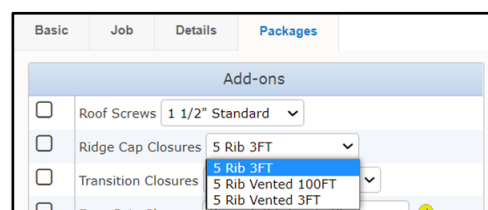


Figure 21: Using a **Group Name** creates a drop-down list of like packages in the user interface.

NOTE – The order in which the items are presented in the drop-down list for each group is determined by the order in which they are sorted in your *Packages List* on the *Packages Administration* page.

Package Name – Enter a name for your package that best describes its contents. If you will be creating several packages under the same **Group Name**, be sure to use a similar and consistent package naming convention, so that users can easily identify the needed materials within their interfaces.

Package Type – Using the drop-down list provided in this field, you will select which of the four package types (Add-on, Base Macro, Bundle or Option) best suits the needs of the package to be created. (See pages 3 and 4 for details about Package Types.)

Default Setting – This field is used to define whether or not a package is “checked” on or off by default. The options available depend upon the `Package Type` that has been selected:

- *Base Macro* – Automatically on by default, and cannot be changed.
- *Add-on* – This default setting can be set to either *On* or *Off*.
- *Bundle* – This default setting can be set to either *On* or *Off*.
- *Option* – There are three potential default settings for an Option package: *Option List* (items in package are priced separately and do not appear in the grand total shown on outputs), *Bundle List* (default *On*; package items appear as a single line item in outputs), and *Hidden* (*Off*).

Info Text – This field is used for the Systems Administrator to make a note about the purpose, contents and/or calculation(s) used within the package.

PACKAGE CONTENTS

Once you have filled out the package property fields, you must add the content – that is, the product(s) and/or service(s) – to your package. If the materials/services are already in your catalog, you will click on the **Add Catalog** button. If you wish to add a material or service that IS NOT in your catalog, you will click on the **Add Misc** button instead. Since it is the option you will use most often, let's take a look at the **Add Catalog** dialog box first.

[illegible]

Figure 22: Use the Add Catalog and Add Misc buttons to add products or services to your new package.

Add Catalog

When you click on the Add Catalog button, a dialog box like the one pictured in **Figure 23** will open. Complete each of the fields in this dialog box, using the instructions below to guide you.

Figure 23: Clicking on the Add Catalog button will open your Materials Catalog and allow you to choose item(s) to add to your new package.

Category – Use the drop-down list to select the category of product you wish to add to your package. The options are: Trim, Sheathing, Accessories, Labor and Freight.

Usage – Enter where or how this material or service is to be used.

Catalog Category – Use the drop-down list to select how this item has been categorized within your catalog. The options are: Trim, Sheathing, Hardware and Fastener.

Catalog Item – this drop-down will provide you with a list of all items available in your catalog for the category you have selected.

SKU – This field will be populated automatically once you have selected your catalog item.

Material – This field will be populated automatically once you have selected your catalog item.

Calculation – This is the computation that will be used to figure the amount of the material or service required for each job. The Calculation shown in **Figure 23** is the total lineal feet of the roof times 3 screws per lineal foot, divided by 250 screws per box.

Color – This drop-down will provide a list of all colors available for the selected material.

Cost – The cost field is populated automatically using the cost information entered into your catalog for the selected material.

Price – The price field is populated automatically using the pricing information entered into your catalog for the selected material.

Add Misc

Clicking on the `Add Misc` button will open a dialog box like the one pictured at in **Figure 24** below. This dialog box allows you to specify materials for a package that do not exist in your *Materials Catalog*. Complete each of the fields in this dialog box, using the instructions below to guide you.

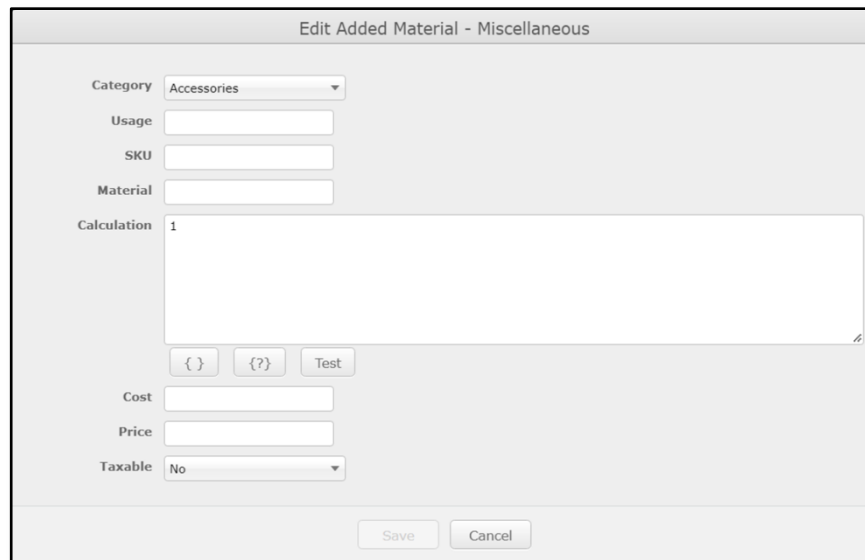


Figure 24: Adding contents to a package using the `Add Misc` option.

Category – Use the drop-down list to select the category of product you wish to add to your package. The options are: `Trim`, `Sheathing`, `Accessories`, `Labor` and `Freight`.

Usage – Enter where or how this material or service is to be used.

SKU – If there is a `SKU` number associated with this material or service, enter it in this field.

Material – Enter the name of the material to be included in this package.

Calculation – This is the computation that will be used to figure the amount of the material or service required for each job.

Cost – Enter the amount a given unit of this service or material will cost your organization to acquire.

Price – Enter the price your organization will charge for a given unit of this material or service.

Taxable – Select `Yes` or `No` from the drop-down list to indicate whether this material or service is subject to federal, state or local taxes.

Package Examples

Given the vast variety of materials and services available offered by different organizations, and the different ways in which each organization categorizes and manages them, it is not possible to provide you with a standard set of packages to work with. Instead, the section that follows will offer some simple examples of packages that are organized and configured properly. They should provide a basic foundation from which you can learn more advanced package development techniques.

FASTENERS PACKAGE

As you can see in the example provided in **Figure 25** below, this organization has created four different packages for Fasteners; two for Screws, one for Clips and one for Rivets. These packages share the same Group Name (Fasteners), so that all these packages will appear in a drop-down list from which end users can make their selection.

The screenshot shows a software interface for configuring a package. On the left is a list of items with checkboxes and labels: Closures (Ridge Cap), Closures (Eave), Fasteners (Screws: Stainless Steel), Fasteners (Screws: Carb. Steel), Fasteners (Clips: Galvanized), Fasteners (Rivets: Galvanized), Freight (Delivery: Per Mile), Freight (Delivery: Flat Rate), Labor (Installation: Nail Strip), Labor (Installation: Mechanically Seamed), Labor (Tear Off: 1 Layer Shingle), and Labor (Tear Off: 2 Layer Shingle). The 'Fasteners (Screws: Carb. Steel)' item is selected. On the right, configuration fields are shown: Group Name (Fasteners), Package Name (Screws: Carb. Steel), Package Type (Add-on), Default Setting (Off), and Info Text (Number of boxes required (250 screws per box)). Below these fields is a table titled 'Define the products in the list below that will be added to the job when this Package is selected'. The table has columns: Category, Usage, Sku, Material, Length, and Color. One row is visible with Category 'Accessori...', Usage 'Roof', Sku '3003', and Material '#10 - 13 x 1-1/2" PHW, Car...'. The interface includes a top bar with 'Main', 'Cancel', 'Save', 'Upload', and 'Download' buttons, and a left sidebar with '+ Add New' and navigation icons.

Figure 25: Example packages for *Fasteners*.

The screenshot shows a dialog box titled 'Edit Added Material - Catalog'. It contains the following fields: Category (Accessories), Usage (Roof), Catalog Category (Fastener), Catalog Item (#10 - 13 x 1-1/2" PHW, C), SKU (3003), Material (#10 - 13 x 1-1/2" PHW, C), and Calculation ({LFRoof}*3/250). Below the calculation field are buttons for '{ }', '{?}', and 'Test'. At the bottom are fields for Color, Cost (\$0.07), and Price (\$0.19), followed by 'Save' and 'Cancel' buttons.

Figure 26: The *Edit Added Material* dialog box shows all the details about the selected material that has been added to this Fasteners package.

LABOR PACKAGE

As you can see in the example shown in **Figure 27** below, this Builder has created four labor-related packages; two for installation services, and two for tear-off labor. Separate labor packages have been developed for installation of the two separate types of materials this company installs; Nail Strip vs. Mechanically Sealed. Likewise, two separate packages have been created for tear-off labor; allowing users to apply different charges based upon whether there will be one or two layers of shingles to be removed.

The screenshot shows a software interface for creating labor packages. On the left is a list of packages with checkboxes and 'Ad' labels. The right side shows the details for the selected package, 'Labor (Tear Off: 1 Layer Shingle)'.

Ad	Package Name
<input type="checkbox"/>	Closures (Ridge Cap)
<input type="checkbox"/>	Closures (Eave)
<input checked="" type="checkbox"/>	Fasteners (Screws: Stainless Steel)
<input type="checkbox"/>	Fasteners (Screws: Carb. Steel)
<input type="checkbox"/>	Fasteners (Clips: Galvanized)
<input type="checkbox"/>	Fasteners (Rivets: Galvanized)
<input type="checkbox"/>	Freight (Delivery: Per Mile)
<input type="checkbox"/>	Freight (Delivery: Flat Rate)
<input checked="" type="checkbox"/>	Labor (Installation: Nail Strip)
<input type="checkbox"/>	Labor (Installation: Mechanically Seamed)
<input type="checkbox"/>	Labor (Tear Off: 1 Layer Shingle)
<input type="checkbox"/>	Labor (Tear Off: 2 Layer Shingle)

Group Name: Labor

Package Name: Tear Off: 1 Layer Shingle

Package Type: Add-on

Default Setting: Off

Info Text:

Define the products in the list below that will be added to the job when this Package is selected

Category	Usage	SKU	Material	Length	Color
Labor	Tear Off - 1 Layer Shingle	Labor1	Dollars of Labor		

Figure 27: Example packages for *Labor*.

The screenshot shows the 'Edit Added Material - Catalog' dialog box. It contains fields for Category, Usage, Catalog Category, Catalog Item, SKU, Material, and Calculation. There are also buttons for { }, {?}, and Test, and input fields for Color, Cost, and Price.

Category: Labor

Usage: Tear Off - 1 Layer Shingle

Catalog Category: Labor

Catalog Item: Dollars of Labor

SKU: Labor1

Material: Dollars of Labor

Calculation: $\{SF\text{Roof}\}/100 \times 45$

{ } {?} Test

Color:

Cost: \$1.00

Price: \$2.50

Save Cancel

Figure 28: the *Edit Added Material* dialog box shows all the details about the selected material that has been added to this Labor package.

FREIGHT PACKAGE

Below (Figure 29) is an example of a Freight package that is based upon mileage. When an end-user selects this package, he/she will be prompted to enter the mileage to the job site, and Roofing Passport will calculate the Cost and Price for Freight based upon this figure.

Category	Usage	Sku	Material	Length	Color
Freight	Delivery	Trip Charge	Trip Charge		

Figure 29: Example packages for *Freight*.

Figure 30: The *Edit Added Material* dialog box shows all the details about the selected material that has been added to this *Freight* package.

Setting Up Outputs

Outputs Overview

The most important feature of any software application is the outputs it provides. Right out of the box, Roofing Passport's outputs include bid forms, material lists, construction drawings, and other documents. Some of these default outputs are "hard coded" and cannot be altered by the Systems Administrator. Others can and should be customized to meet the specific needs of your organization. Of course, in addition to the default outputs provided, there are virtually limitless options for creating your own custom outputs using Roofing Passport data. The table below shows the basic properties of each of Roofing Passport's eight default outputs. This table is immediately followed by a brief description of each of these outputs.

TABLE OF DEFAULT OUTPUTS

NO.	OUTPUT NAME	Template Upld/Dwnld Format	User Dwnld Format(s)	Can Customize?
1	Simple Bid	DOCX	DOCX	Yes - Full
2	Bid with Payment Schedule	DOCX	DOCX	Yes - Full
3	Roof Layout Drawing	N/A	PDF, DXF	Yes - Limited
4	Sheathing Drawings	N/A	PDF, DXF	No
5	Materials List	CSV	CSV	Yes - Limited
6	Materials List by Category	XLSX	XLSX	Yes - Limited
7	Finished Product Order	PDF	PDF	Yes - Limited
8	Job Summary Sheet	DOCX	PDF	Yes - Full

Default Output Descriptions

BID OUTPUTS

Out of the box, Roofing Passport provides two *Bid* templates that can be quickly and easily customized for your company's use.

1. **Simple Bid** – The *Simple Bid* template includes all the basic information required for submitting a customized bid to a potential customer. (Click [here](#) to view a copy of the *Simple Bid* output.)
2. **Sales Quote** – Perhaps more than any other Roofing Passport output, the contents and design of the *Sales Quote* varies greatly by organization. Using the tokens provided in the *Add Report* dialog box (see page 7) Systems Administrators can create one or more *Sales Quote* templates that provide the specific information needed by their organizations. (Click [here](#) to view an example of a *Sales Quote* document.)

DRAWINGS

Roofing Passport offers two different default construction drawings that can be output in either PDF or DXF format (for use with CAD/CAM applications):

3. **Roof Layout Drawing** – A single-page drawing that shows the general layout and dimensions of an entire roof. There are only two customizations available for this output: 1) whether or not to include the display of the sheathing panels in the drawing, and 2) whether the output is to be provided in PDF or DXF format. (Click [here](#) to view an example of the *Roof Layout Drawing* output.)
4. **Sheathing Drawings** – A multipage output that provides a separate drawing for each roof plane, showing the precise dimensions and layout of each panel. The only customization available for this output is whether it is to be provided in PDF or DXF format. (Click [here](#) to view an example of the *Sheathing Drawings* output.)

MATERIAL LISTS & ORDERS

5. **Materials List**¹ – This output provides comprehensive, detailed materials data for a job in CSV format. There are 11 properties that can be included or excluded from this output. (Click [here](#) to view an example of the *Materials List* output.)
6. **Materials List by Category**² – Provided in Microsoft Excel (XLSX) format, this output includes a material requirements summary tab along with a separate tab for each material category (Sheathing, Trim, Accessories, etc.). This output can be customized to limit the materials to those provided by a specific supplier. (Click [here](#) to view an example of the *Materials List by Category* output.)
7. **Finished Product Order** – An order form, to be submitted to a manufacturer, that includes all of the finished sheathing, trim, and other materials required for a job. The only customization available for this output is the System Administrator's ability to add "disclaimer text" to the bottom of the document. (Click [here](#) to view an example of the *Finished Product Order* output.)

MISC/OTHER

8. **Job Summary Sheet**³ – Commonly used as a cover sheet for other outputs, the *Job Summary Sheet* lists key job information, such as the customer name and job address. Like the *Bid* outputs, this fully customizable template is created as a Microsoft Word document and output by users in PDF format. (Click [here](#) to view a copy of the *Job Summary Sheet* output.)

¹ Formerly "Job Data CSV."

² Formerly "Excel Workbook."

³ Formerly "Summary Sheet."

Parts of the Outputs Administration Window

Setting up and customizing the Roofing Passport outputs for your organization is accomplished using the *Outputs Administration* page Shown in **Figure 31** below. To access this page, go to the *Page Header* and click on *Settings* → *Outputs*. Please take a moment to review the various parts of the Outputs window, as described below.

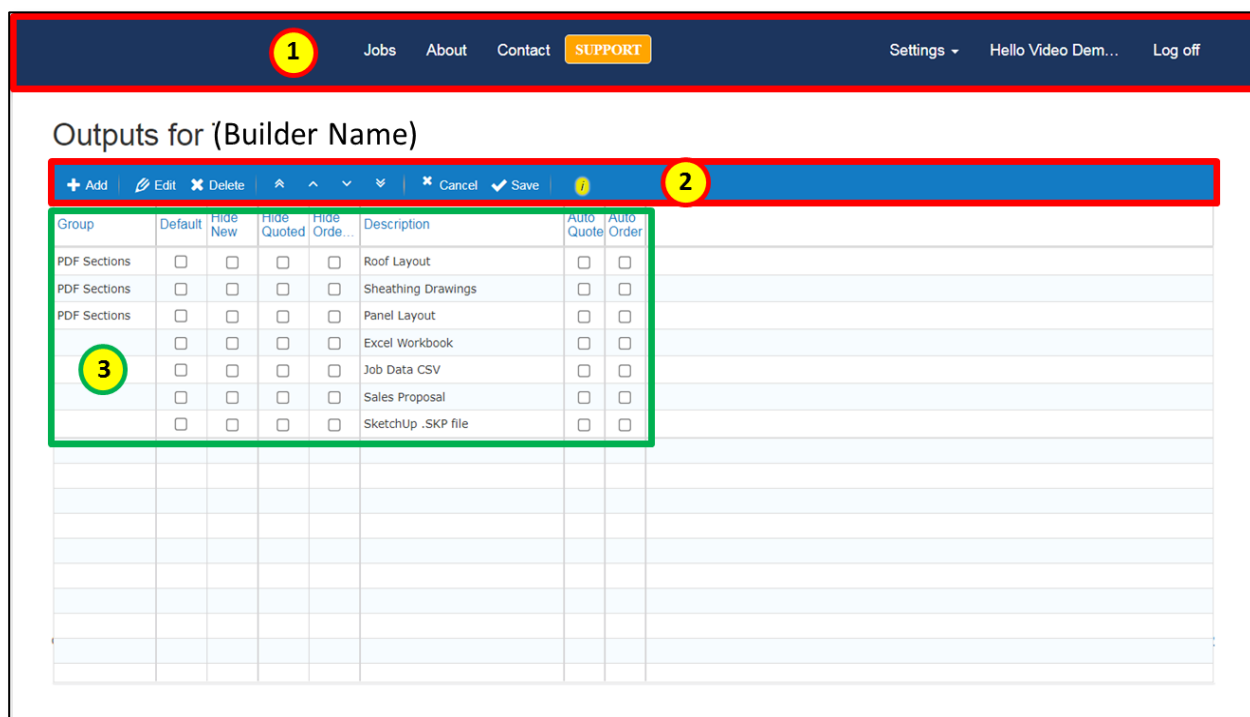


Figure 31: Parts of the Roofing Passport *Outputs* window used by System Administrators.

1. **Page Header** – The *Page Header* is common to most areas within the Roofing Passport interface. The functions related to the *Page Header* are outlined in multiple Roofing Passport help documents, so we will not repeat them here. (See the [Roofing Passport Quick Start User's Guide](#) for additional information)
2. **Outputs Toolbar** – The *Outputs Toolbar* contains command buttons for executing the most common functions on the Roofing Passport *Outputs Administration* page. Following is a list of these commands and the purpose of each:
 - **Add** – Click the *Add* button to create a new output for your organization. Clicking on this button will open a dialog box that allows you to choose the type of output you wish to create, along with any output-specific parameters that need to be defined.
 - **Edit** – This will display a dialog box allowing you to make changes to the parameters for the selected output.
 - **Delete** – Removes selected output from the system.
 - **Move Top** – Clicking on this button will move the selected *Output* to the very top of your Outputs List.

- **Move Up** – Clicking on this button will move the selected *Output* up one spot in your Outputs List.
 - **Move Down** – Clicking on this button will move the selected *Output* down one spot in your Outputs List.
 - **Move Bottom** – Clicking on this button will move the selected *Output* to the very bottom of your Outputs List.
 - **Cancel** – Clicking on the `Cancel` button will return you to your *Jobs List* page without saving any changes you have made to the configuration of your Outputs.
 - **Save** – Click on the `Save` button to retain all changes made to the configuration of your Outputs since the last `Save` operation. If you attempt to leave the *Outputs* page without saving your changes, a dialog box will open asking if you wish to `Save` your changes before leaving.
3. **Outputs List** – This section of the *Outputs* window displays all of the outputs that are currently available to your users. As you can see in **Figure 31** (previous page), the *Outputs List* contains eight (8) columns of information that are used to describe and configure each Output. Here is a brief description of the purpose and function of each of these columns:
- **Group** – The `Group` column is used to indicate whether or not a given output is produced in PDF format. All PDF-based outputs are grouped together at the top of the System Administrator’s Outputs page.
 - **Default** – Activating this `Default` checkbox automatically includes the selected output for users when they click on the *Outputs* button for a job.
 - **Hide New** – Activating the `Hide New` checkbox will hide the selected Output from users when the current status for job is listed as “New” in a Roofing Passport.
 - **Hide Quoted** – Activating the `Hide Quoted` checkbox will hide the selected Output from users when the current status for a Roofing Passport job is listed as “Quoted.”
 - **Hide Ordered** – Activating the `Hide Ordered` checkbox will hide the selected Output from users when the current status for a Roofing Passport job is listed as “Ordered.”
 - **Description** – This field is used to provide a `Name` and `Description` for each output that can easily be recognized by users. This field is automatically populated by Roofing Passport within the *Create Output* dialog box, however, System Administrators have the ability to enter any descriptive information they wish.
 - **Auto Quote** – Activating the `Auto Quote` checkbox causes the selected *Output* to be generated automatically whenever a job’s status is changed to “Quoted.”
 - **Auto Order** – Activating the `Auto Order` checkbox causes the selected *Output* to be generated automatically whenever a job’s status is changed to “Ordered.”

NOTE – The Outputs List in **Figure 31** (previous page) shows the four outputs that Roofing Passport includes in your list by default. These four outputs can be deleted or modified by the Systems Administrator in any way he/she deems appropriate.

Customizing Default Outputs

There are two basic methods of output customization. The two default *Bid* outputs and the *Job Summary Sheet* are modified using Microsoft Word and programming “tokens.” (More on this in a bit.) All other default outputs are modified using a configuration dialog box accessed from the System Administrator’s *Outputs* page. More information about each of these customization methods is provided immediately below

CUSTOMIZING WORD-BASED OUTPUTS

Roofing Passport’s two default *Bid* outputs and *Job Summary Sheet* are fully customizable Microsoft Word documents. To modify an existing Word-based output, from the System Administrator’s *Outputs* page, click on the desired output to select it, and then click on the **Edit** button at the top of the page. This will open an **Edit Report** dialog box like the one pictured at right. From this dialog box, click on the **Download** button to create a copy of the existing template on your local computer. Next, you will open the downloaded document in Microsoft Word and make the desired changes to the document’s layout and contents. When you are done, you will then reopen this **Edit Report** dialog box and use the **Upload** button to replace the existing default output with your newly customized version.

NOTE – Roofing Passport uses programming “tokens” to insert the appropriate job-specific information into each field on Word-based outputs. To learn how to use Roofing Passport’s programming tokens to customize your outputs please see the help document [Universal Tokens for Creating Custom Outputs](#).

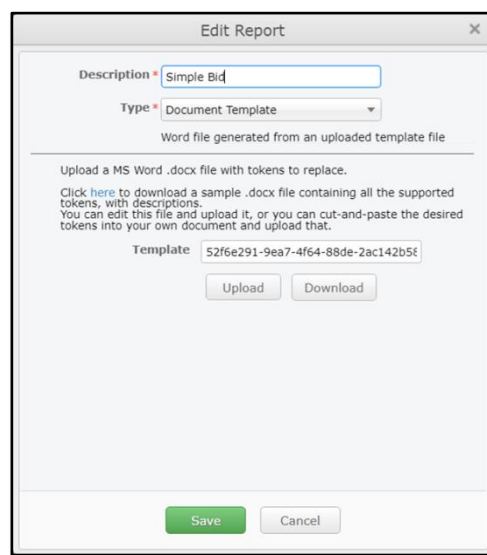


Figure 32: Example *Edit Report* dialog for a Word-based output.

Customizing the Simple Bid Template

The purpose of this section is to provide System Administrators with the information needed to quickly set up and install a simple *Job Bid Template* for their users. The process is quick and easy, provided the System Administrator has some small degree of familiarity with Microsoft Word. If you are unfamiliar with Microsoft Word basics, or if you wish to create a highly customized *Bid Template*, please contact our Support Team at support@keymark.com.

STEP-BY-STEP INSTRUCTIONS

For our purposes here, we will use the *Bid Template* shown in the [Appendix](#) of this document. This template combines standard sections of text with job-specific information that is supplied automatically by your Roofing Passport database. To set up your simple *Job Bid Template*, perform the steps below in the order presented:

Customizing the Template

1. Download the sample Job Bid Template by clicking [here](#).
2. Save your downloaded sample *Job Bid Template* to a location on your computer from which it can easily be retrieved. (We recommend saving it to your desktop for the time being.)
3. Open the *Job Bid Template* and take a moment to review its various sections. The only changes you will need to make to this template are in the header section at the top of the page, as pictured in **Figure 33** below. You will change the logo picture to that of your company, and type in your company's name, address, phone, fax and email information. That's all there is to it.

	BID FOR METAL ROOFING	Bid Date:{CurrentDate}
	YOUR COMPANY NAME	Salesperson:{SalespersonName}
	Your Company Address	Sales Phone:{SalespersonPhone}
	Phone: (XXX) XXX-XXXX Fax: (XXX) XXX-XXXX	Sales Email:{SalespersonEmail}
	Email:	

Figure 33: The Header Section at the top of the *Bid Template* is the only place you need to make any changes.

4. To begin, click on the picture that says “*Insert your logo here*” to select it, and then use the Delete key on your keyboard to delete the picture from the template. Now, with your mouse icon still active in the cell where the temporary picture was placed, go to the ribbon at the top of your Microsoft Word window and click on the Insert tab. From the options listed, click on the Picture button, as shown in **Figure 34**. This will open the *Insert Picture* dialog box shown in **Figure 35** on the following page.

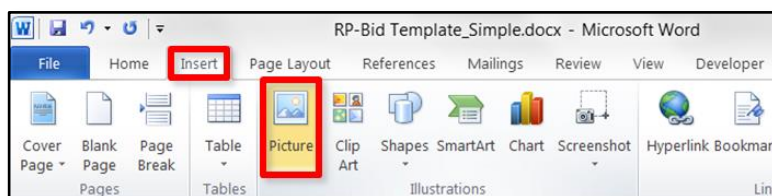


Figure 34: Click on the Picture button to insert your logo.

5. Use the Insert Picture dialog box (below) to navigate to the location where your company's .PNG logo file is stored. Click on your logo file to select it, and then click on the **Insert** button to insert your logo into the template, as shown in **Figure 35**.

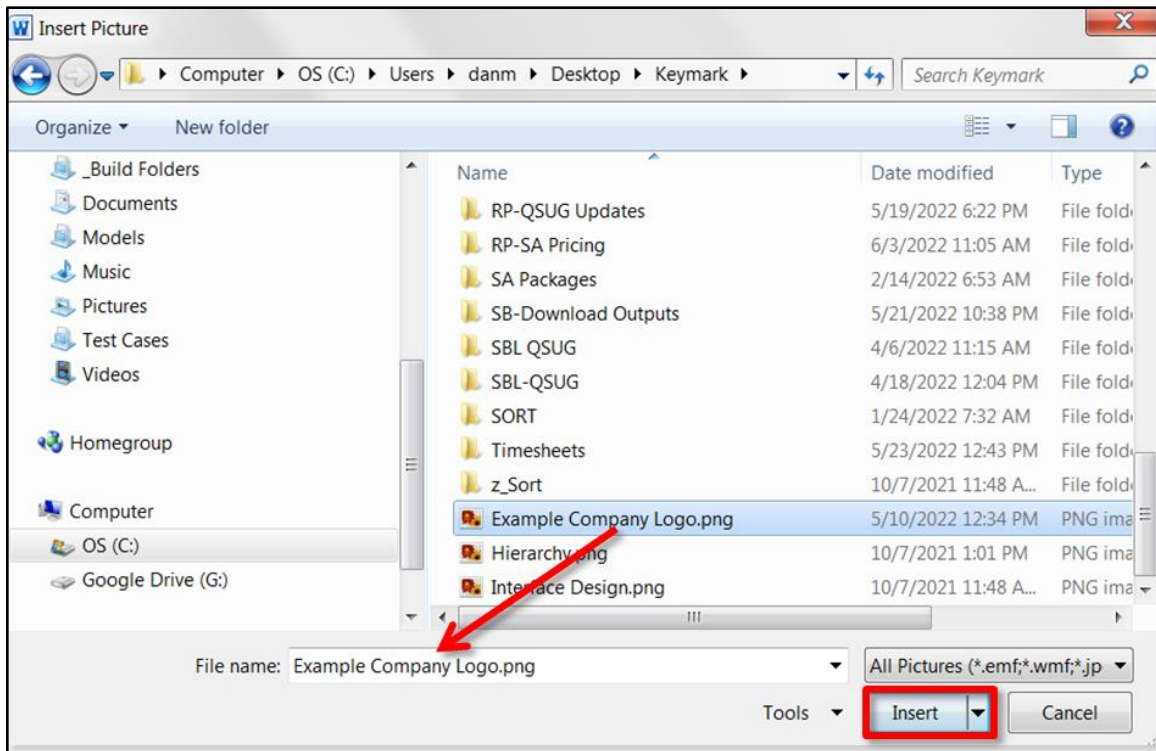


Figure 35: Navigate to the location where your logo file is stored, select it, and click on the **Insert** button.

6. Once your picture has been inserted, click and drag on the control handles to resize the picture as necessary to fit within the space provided. (See **Figure 36** at right.)

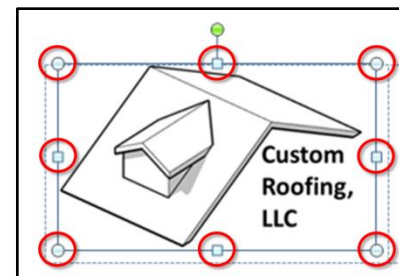


Figure 36: Resize your logo as needed using the control handles.

- With your logo now in place, move over one cell to the right, to enter your company's Name, Street Address, Phone, Fax and Email Address. Begin by highlighting the words "Your Company Name" as shown in the top portion of **Figure 37**. Now type in the name for your company as you want it to appear on the template. Next, do the same to highlight the line "Your Company Address", and type in your organization's Street Address. Finally, click your mouse to the right of the colon next to Phone, Fax and Email, in turn, typing in the needed information. If you are comfortable using Microsoft Word, you can change font styles and sizes, but be sure that the lines are balanced and fit within the space provided. When you are done, this section of your template should appear something like that shown on the bottom half of **Figure 37**.

Figure 37: Select the line shown in the BEFORE picture above, and type in your company's name.

- All the remaining sections of the Sample Bid Template are set up to be completed automatically by Roofing Passport, using tokens that supply job-specific information from your database. There's nothing further you need to do other than save your changes.

Uploading Your Template

Now that your template's *Header Section* has been customized, the time has come to upload your modified document to the Roofing Passport database, for your users to access. To upload your template, complete the following steps in the order presented:

- Log in to Roofing Passport, click on the **Settings** menu at the top of the page, and select **Outputs** from the drop-down list, as shown in **Figure 38** (right).
NOTE – You must be granted System Administrator privileges in Roofing Passport in order for the **Settings** menu to be visible to you.
- Your Roofing Passport *Outputs Administration* page will open, similar to the one pictured in **Figure 39** shown on the following page.

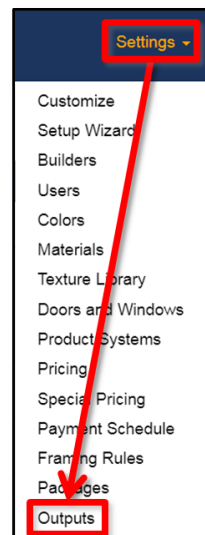


Figure 38: Select Outputs from the Settings menu.

- On the command toolbar on the *Outputs Administration* page, click on the Add button, as shown in **Figure 39** below.

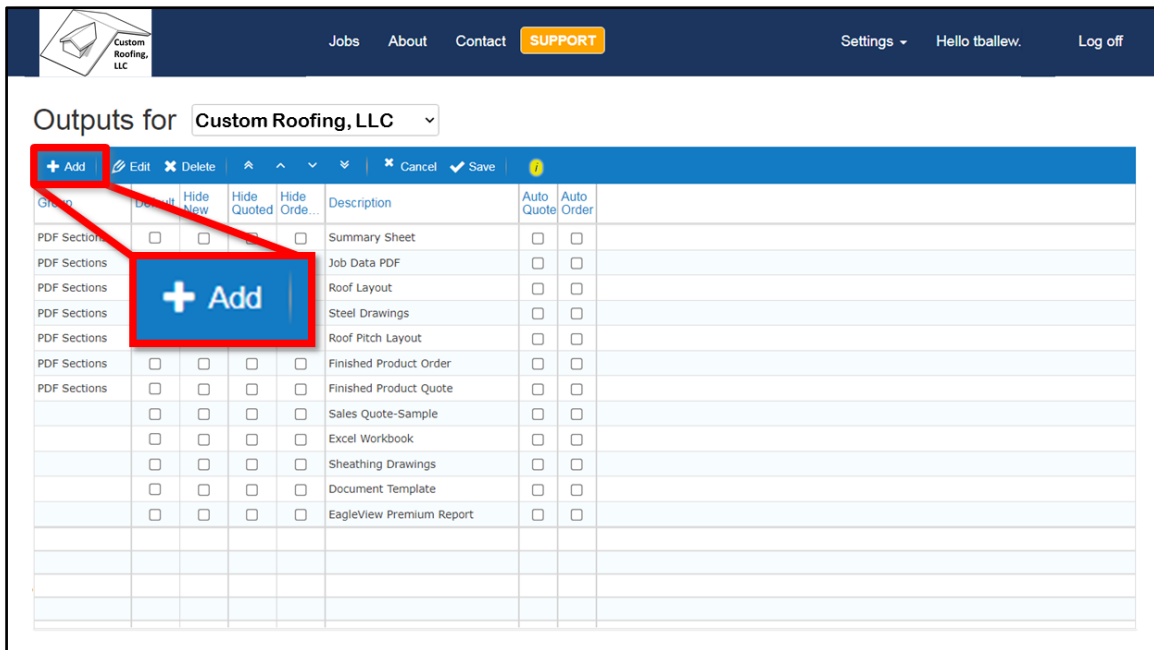


Figure 39: On the *Outputs Administration* page, click on the Add button to upload your new template.

- The *Add Report* dialog box pictured in **Figure 40** (right) will open. Type a name for your template in the *Description* field at the top of the dialog. We suggest using a name such as *Job Bid (Simple)*. That way, if you develop multiple *Job Bid* templates, you can group them together alphabetically in order to make them easier for your users to locate within the interface. [e.g. *Job Bid (Simple)*, *Job Bid (Detailed)*, etc.]
- Click on the drop-down arrow to the right of the *Type* field and, since we will be uploading a Microsoft Word document, select *Document Template* from the drop down list. When you do, the contents of the *Add Report* dialog box will change, as pictured in **Figure 41** on the following page.

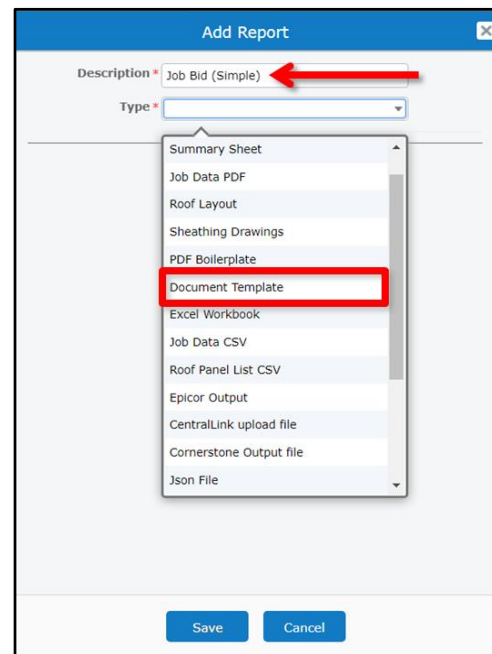


Figure 40: Type in a name for your template and select *Document Template* from the *Type* drop-down list.

6. Now, in the *Add Report* dialog box, click on the **Upload** button (**Figure 41**) to initiate the upload process. The **Choose File** button will become visible. Click on the **Choose File** button.

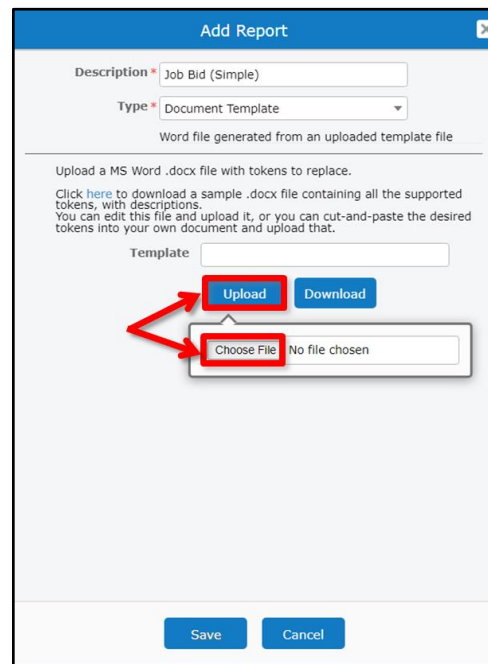


Figure 41: Click on the **Upload** button, and then the **Choose File** button to initiate the upload process.

7. Once you click on the **Choose File** button, the Windows (or Mac) *Open* dialog box will appear. (See **Figure 42** below.) Navigate to the location where you have saved your template file and select the file by clicking on it. Once your file has been selected, click on the **Open** button to close this dialog box and return to the Roofing Passport *Add Report* dialog box.

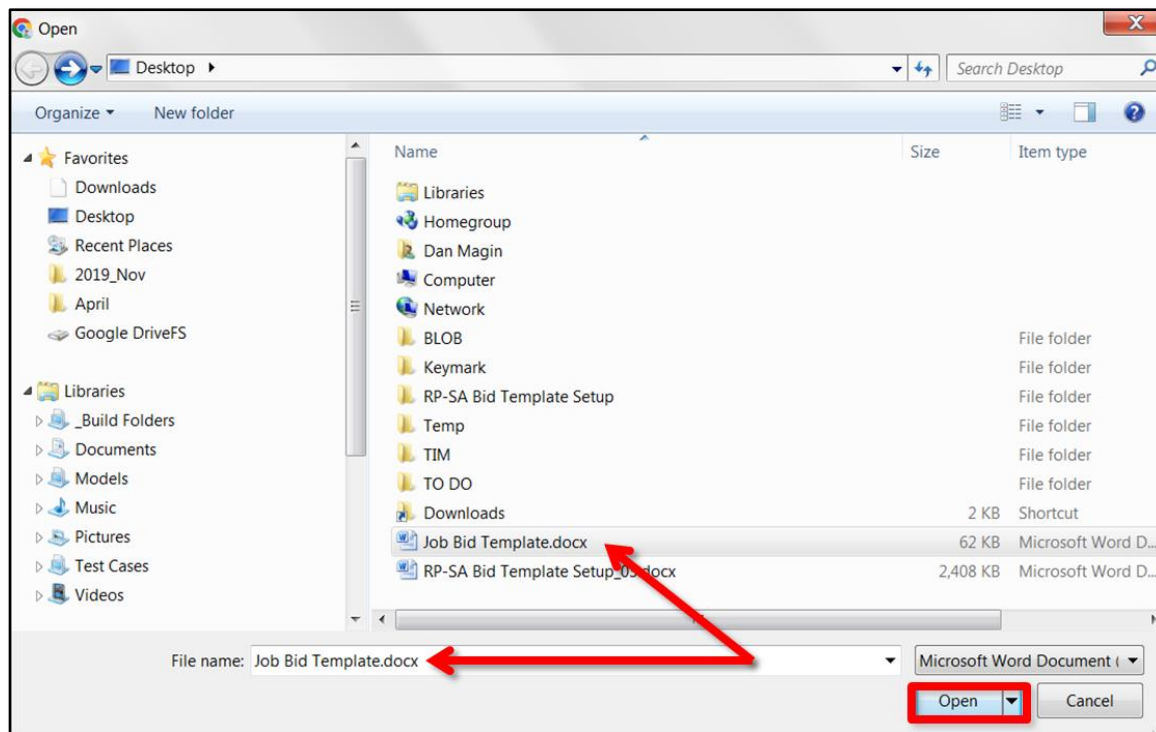


Figure 42: Select your template file from its stored location and click on the **Open** button.

-
- Add Report**
- Description * Job Bid (Simple)
- Type * Document Template
- Word file generated from an uploaded template file
- Upload a MS Word .docx file with tokens to replace.
- Click [here](#) to download a sample .docx file containing all the supported tokens, with descriptions.
- You can edit this file and upload it, or you can cut-and-paste the desired tokens into your own document and upload that.
- Template ead93ef4-5faf-49ff-a2d1-906879ef0e05.c
- Upload Download
- Save Cancel

Figure 43: The Template field now indicates that a file has been selected and is ready to upload.

- ## Outputs for Custom Roofing, LLC
- | Group | Default | Hide New | Hide Quoted | Hide Order... | Description | Auto Quote | Auto Order |
|--------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|--------------------------|
| PDF Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Summary Sheet | <input type="checkbox"/> | <input type="checkbox"/> |
| PDF Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Job Data PDF | <input type="checkbox"/> | <input type="checkbox"/> |
| PDF Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Roof Layout | <input type="checkbox"/> | <input type="checkbox"/> |
| PDF Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Steel Drawings | <input type="checkbox"/> | <input type="checkbox"/> |
| PDF Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Roof Pitch Layout | <input type="checkbox"/> | <input type="checkbox"/> |
| PDF Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Finished Product Order | <input type="checkbox"/> | <input type="checkbox"/> |
| PDF Sections | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Finished Product Quote | <input type="checkbox"/> | <input type="checkbox"/> |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Sales Quote-Sample | <input type="checkbox"/> | <input type="checkbox"/> |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Excel Workbook | <input type="checkbox"/> | <input type="checkbox"/> |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Sheathing Drawings | <input type="checkbox"/> | <input type="checkbox"/> |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Document Template | <input type="checkbox"/> | <input type="checkbox"/> |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | EagleView Premium Report | <input type="checkbox"/> | <input type="checkbox"/> |
| | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | Job Bid (Simple) | <input type="checkbox"/> | <input type="checkbox"/> |

Figure 44: Your new *Job Bid Template* now appears in the list of *Outputs*.

Checking Template Performance

Now that your new *Job Bid Template* has been uploaded to Roofing Passport, we will generate a bid to make sure that everything is working properly. To check your template's performance, complete the following steps in the order presented:

1. From within the Roofing Passport interface, navigate to your *Jobs List* page. Choose a job to work with, and click on the *Outputs* button to the left of that job, as pictured in **Figure 45** below.

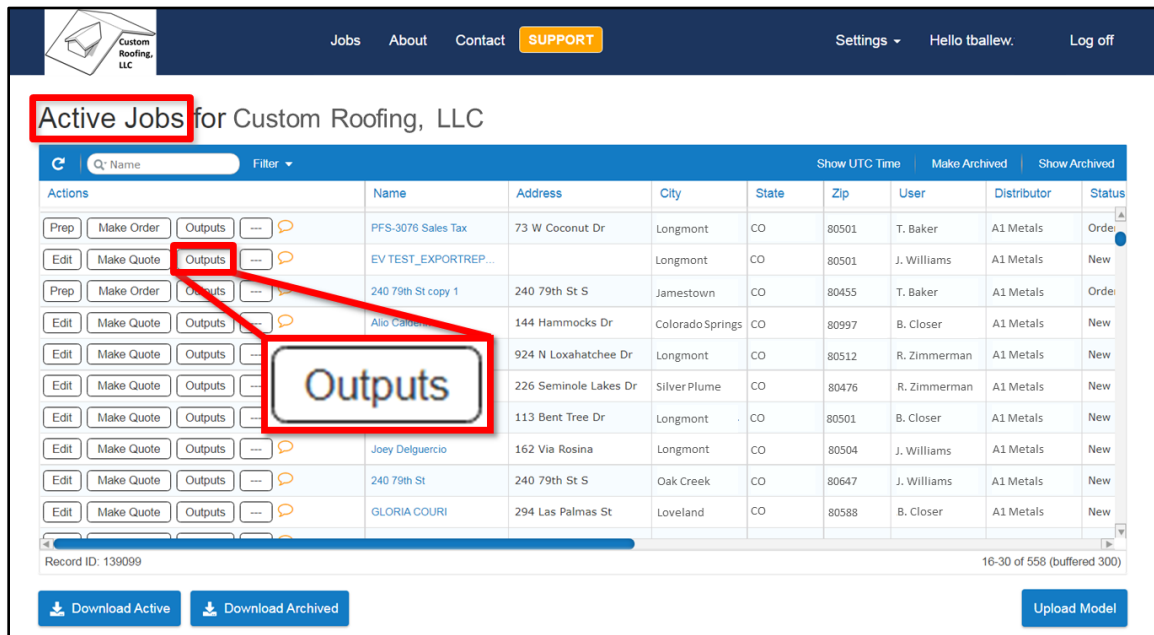



Figure 45: Choose a job to work with and click on the *Outputs* button to the left of that job.

2. The *Download Outputs* page will open for the selected job. Locate your newly uploaded *Job Bid Template*, as pictured in **Figure 46** on the following page. Click in the checkbox to the left of the *Job Bid (Simple)* file and then click on the *Download* button in the upper-right hand corner of the *Download Outputs* page. This will initiate the download process.

- 
- Download Outputs for "9665 Trendle Ln"
- PDF Sections:
- ☐ Summary Sheet
 - ☒ Job Bid (Simple)
 - ☐ Roof Pitch Layout
 - ☐ Roof Layout
 - ☐ Finished Product Quote
 - ☐ Steel Drawings
- Other Files:
- ☒ Job Bid (Simple)
 - ☐ Sales Quote-Sample
 - ☐ Excel Workbook
 - ☐ Sheathing Drawings
 - ☐ Document Template
- Buttons: All On, All Off, Download
- Navigation: < Back to List

That's all there is to modifying and uploading your customized *Simple Bid Template* in Roofing Passport. If you have any difficulty, or need to make additional customizations, please contact support@keymark.com.

CUSTOMIZING OTHER DEFAULT OUTPUTS

All non-Word related outputs are customized directly within the Roofing Passport interface. To customize a non-Word output, go to the *Outputs Administration* page, click on the desired output to select it, and then click on the **Edit** button at the top of the page. This will open an **Edit Report** dialog box that presents you with the specific customizations available for that output. For example, **Figure 47** at right shows the **Edit Report** dialog box for the *Materials List* output. Here, you can see, the Systems Administrator is provided with 11 different options for customizing the contents of this output. Details about each option are provided at the top of the dialog.

Once you have made changes to the contents of a non-Word-related output, simply click on the **Save** button at the bottom of the dialog box to retain your changes. All subsequent outputs of this type generated by end-users will reflect the changes you have made.

Customization Video

That's all there is to our basic overview of Roofing Passport's default outputs and the basic processes used in their customization. For additional information, please see our help video entitled [Customizing Roofing Passport Outputs](#).

The screenshot shows the 'Edit Report' dialog box for the 'Materials List' output. At the top, there is a 'Description' field containing 'Materials List' and a 'Type' dropdown menu set to 'Job Data CSV'. Below this, it says 'Job Data in CSV format'. The main body of the dialog contains 11 customization options, each with a description and a control (checkbox or text field):

- Include Job Infos**: will output the Job Infos for the job on one line. ☐
- JobInfos**: is the comma-separated list of field:heading settings, allowing you to define the fields, their order, and their headings. Leave **JobInfos** blank to output a file with all of the Job Infos, using the field name as the heading.
- Include Materials**: will output the materials for the job. ☒
- Ignore Usage**: will consolidate entries regardless of their usage. ☒
- Omit Category Groups**: will combine all entries into one list. ☐
- Group Addons**: will keep Add-ons with their component (Door, Window, or Cupola). ☐
- Omit Header Row**: will leave out the header row, so the only output will be the entries themselves. ☐
- Columns**: is the comma-separated list of field:heading settings, allowing you to define the columns, their order, and their headings. Leave **Columns** blank to output a file with all of the columns, using the field name as the heading.
- Pitch Totals**: Includes total sf for each roof pitch and total lf for each sloped trim. ☐
- Skip Pricing Errors**: Skips materials with pricing errors. ☐
- Supplier Id**: Limits output to a supplier id and reports that suppliers sku.

At the bottom of the dialog are two buttons: 'Save' (green) and 'Cancel' (grey).

Figure 47: Edit Report dialog box for the *Materials List* output.

Creating New Outputs

To create a new output, on the *Outputs Administration* page go to the *Outputs Toolbar* and click on the *Add* button. This will open the *Add Report* dialog box pictured at right in **Figure 48**. Using the *Type* drop-down list in this dialog box, select the type of output you wish to create. The contents displayed in the lower portion of this dialog box will then change, depending on the type of output you have selected. We will outline the required procedures for each different type of output in the pages that follow.

NOTE – Once you have selected an *Output Type* from the drop-down list, Roofing Passport will automatically populate the *Description* field above it with the name of the item selected. If you later change the *Type* of output selected from the drop-down list, Roofing Passport WILL NOT automatically change the *Description* field.

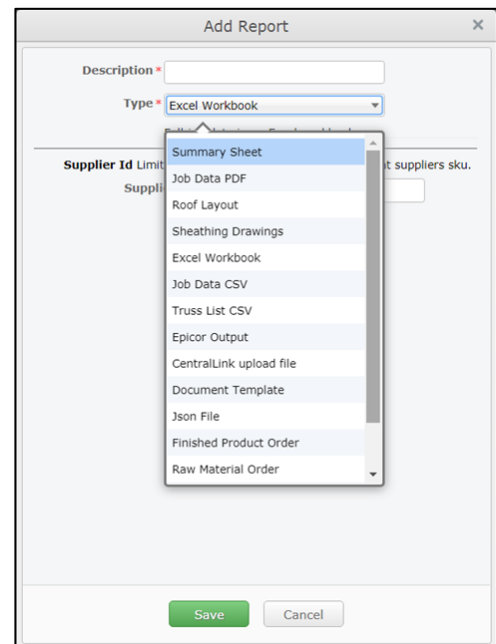


Figure 48: The *Add Report* [output] dialog box.

COMPREHENSIVE JOB DATA (EXCEL WORKBOOK)

The *Excel Workbook* (a.k.a. the *Comprehensive Job Data* output) provides documentation of ALL job-related data for a project. (See [Appendix B](#) of this document for a sample *Excel Workbook*.)

As you can see in **Figure 49** at right, the *Supplier ID* field is the only customization option available for this output. If you wish to restrict this particular output to include only those materials provided by a specific *Supplier*, you can enter that *Supplier's* ID in the field provided here.

Once you have entered the required information, click on the *Save* button to close the dialog box and save the new output.



Figure 49: The *Add Report* dialog box used to create a new *Excel Workbook* output.

CUSTOM JOB DATA (PDF)

As the name implies, the *Custom Job Data* output is a highly customizable report that can be configured to meet the specific needs of your organization. This output is available in two formats; PDF (described here), and CSV (described in the section immediately following). Your *Job Data* output can include any or all of the information listed below:

1. **Include Job Info [Checkbox]** – When this checkbox is enabled, some or all information listed on the Job Tab will be included in the output (building address, contacts, etc.). The specific information to be included is defined in the *Job Infos* field immediately below it.
2. **Job Infos [Field]** – When the *Include Job Info* checkbox has been enabled, the *Job Infos* field is used to limit the *Job Data* included in the output to the specific data elements defined by you, the Systems Administrator. If you leave this field blank, ALL job fields displayed on the *Jobs Tab* of the *Property Pane* will be included in the output. For information on how to fill out the *Job Infos* field, please see [Populating the Jobs Info Field](#) on page 12.
3. **Include Materials [Checkbox]** – When this checkbox is enabled, this *Job Data* output will include a summary of the job's required materials. (See [Appendix C](#) on page 20 for an example *Job Data* output that includes materials.)
4. **Ignore Usage [Checkbox]** – When this checkbox is enabled, this output will consolidate entries under each type of material (Sheathing, Trim, Accessories, etc.) regardless of the materials' usage. For example, when the same material is used for both gable trim and eave trim, these materials will be combined as a single line item on the output.
5. **Omit Category Groups [Checkbox]** – When this checkbox is enabled, Roofing Passport combines all required materials into a single list, without a header row separating each material by type.
6. **Group Addons [Checkbox]** – When this checkbox is enabled, Roofing Passport will list all Add-ons with their associated component (Door, Window, or Cupola, etc.).
7. **Columns [Field]** – The *Columns* field is used to define the specific columns of data in the *Materials Database* that are to be included in an output. If you leave this field blank, ALL columns of materials data will be included. If you wish to restrict the materials data to specific columns, you will need to enter the name of each column PRECISELY as it appears in the Materials Database AND in the specific format required by Roofing Passport. For additional information, please see the nearly identical process outlined under [Populating the Job Infos Field](#) on page 12.
8. **Pitch Totals [Checkbox]** – When this checkbox is enabled, the output will include a calculation for the square feet of each roof pitch (plane), as well as the total combined square feet for the entire job.

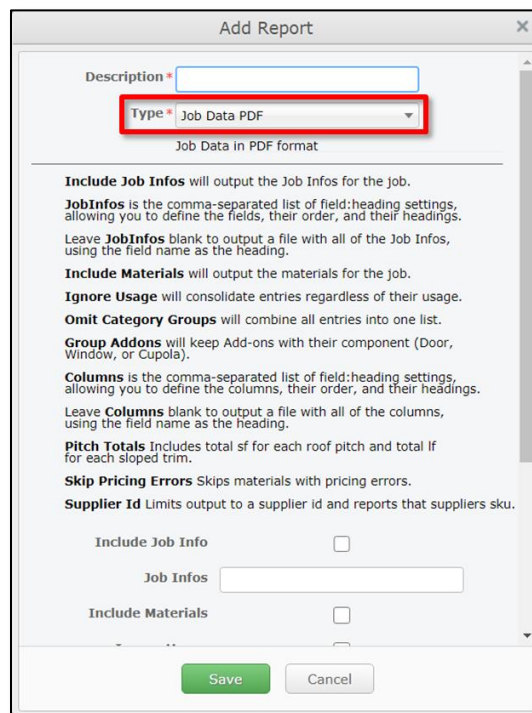


Figure 50: The *Add Report* dialog as it appears when creating a new *Job Data PDF* output.

9. **Skip Material Errors [Checkbox]** – When this checkbox is enabled, this output will omit all materials with recognized pricing errors.
10. **Supplier Id [Field]** – If you are including materials information in your *Job Data* output, and you wish to limit the materials included to one or more specific Suppliers, you must enter the target Supplier ID(s) into this field. When adding multiple Supplier IDs, separate each with a comma.

CUSTOM JOB DATA (CSV)

The *Custom Job Data* output is available in two formats; CSV (Comma Separated Values) which is described here, and PDF, which is described in on the previous page. This output is highly customizable and can include any or all of the information listed below:

1. **Include Job Info [Checkbox]** – When this checkbox is enabled, some or all of the information listed on the Job Tab will be included in the output (building address, contacts, etc.). The specific information to be included is defined in the *Job Infos* field immediately below it.
2. **Job Infos [Field]** – Once the *Include Job Info* checkbox has been enabled, the *Job Infos* field is used to limit the job data to be included in the output to the specific data elements defined by you, the Systems Administrator. If you leave this field blank, ALL job fields displayed on the *Jobs Tab* of the *Property Pane* will be included in the output. For information on how to fill out the *Job Infos* field, please see [Populating the Jobs Info Field](#) on page 12.
3. **Include Materials [Checkbox]** – When this checkbox is enabled, the *Job Data* output will include a summary of the job's required materials. (See [Appendix D](#) on page 21 for an example *Job Data* output that includes materials.)
4. **Ignore Usage [Checkbox]** – When this checkbox is enabled, this output will consolidate entries under each type of material (Sheathing, Trim, Accessories, etc.) regardless of the material's usage. For example, when the same material is used for both gable trim and eave trim, these materials will be combined as a single line item on the output.
5. **Omit Category Groups [Checkbox]** – When this checkbox is enabled, Roofing Passport combines all required materials into a single list, without a header row separating each materials group by type.
6. **Group Addons [Checkbox]** – When this checkbox is enabled, Roofing Passport will list all Add-ons with their associated component (Door, Window, or Cupola, etc.).
7. **Omit Header Row [Checkbox]** – When this checkbox is enabled, your *Jobs Data CSV* output WILL NOT include any of the header rows used to identify the contents of each column of data. This feature is made available for organizations that Upload Roofing Passport data into other applications they use in house.

Figure 51: The *Add Report* dialog as it appears when creating a new *Job Data CSV* output.

8. **Columns [Field]** – The `Columns` field is used to define the specific columns of data in the *Materials Database* that are to be included in an output. If you leave this field blank, ALL columns of materials data will be included. If you wish to restrict the materials data to specific columns, you will need to enter the name of each column PRECISELY as it appears in the *Materials Database* AND in the specific format required by Roofing Passport. For additional information, please see the nearly identical process documented under [Populating the Job Infos Field](#) on page 12.
9. **Pitch Totals [Checkbox]** – When this checkbox is enabled, the output will include a calculation for the square feet of each roof pitch (plane), as well as the total combined square feet for the entire job.
10. **Skip Material Errors [Checkbox]** – When this checkbox is enabled, the output will omit all materials with recognized pricing errors.
11. **Supplier Id [Field]** – If you are including materials information in your *Job Data* output, and you wish to limit the materials included to one or more specific *Suppliers*, you must enter the target Supplier ID(s) into this field. When adding multiple Supplier IDs, separate each with a comma.

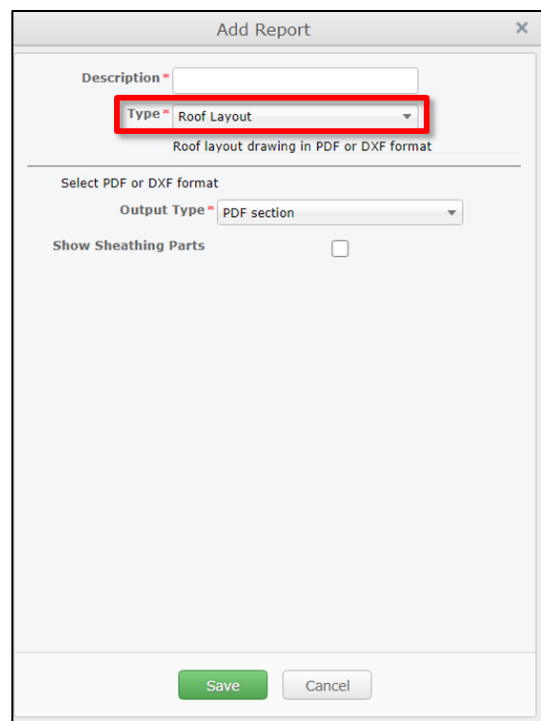
ROOF LAYOUT DRAWING

The *Roof Layout* output is a single-page report that provides an aerial view of ALL of the planes (sections) that comprise an entire roof. There are only two customizations that can be applied to this output:

Output Type – Use the drop-down list provided to select whether this output is to be produced in PDF or DXF (AutoCAD) file format.

Show Sheathing Parts – When this checkbox is enabled, this output will include the layout of ALL sheathing parts for an entire roof.

Please see [Appendix F](#) on page 56 for an example *Roof Layout Drawing*.



The screenshot shows the 'Add Report' dialog box. The 'Description' field is empty. The 'Type' dropdown menu is open, showing 'Roof Layout' selected, and this area is highlighted with a red rectangle. Below the 'Type' dropdown, the text 'Roof layout drawing in PDF or DXF format' is displayed. The 'Select PDF or DXF format' section shows the 'Output Type' dropdown set to 'PDF section'. The 'Show Sheathing Parts' checkbox is unchecked. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 52: The *Add Report* dialog as it appears when creating a new *Roof Layout* output.

SHEATHING DRAWINGS

The *Sheathing Drawings* output is a multi-page report that provides a one-page drawing for each section of a roof, and the layout of sheathing panels on that section. Use the drop-down arrow provided to select whether the output is to be produced in PDF or DXF (AutoCAD) file format.

Please see [Appendix F](#) on page 23 for an example *Sheathing Drawing*.

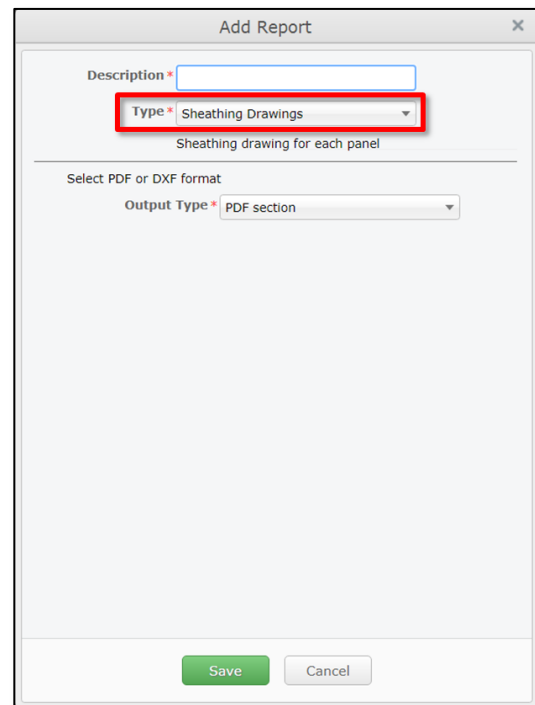
The image shows the 'Add Report' dialog box. At the top, there is a 'Description' text field. Below it is a 'Type' dropdown menu with 'Sheathing Drawings' selected. A red rectangle highlights the 'Type' dropdown. Below the dropdown, the text 'Sheathing drawing for each panel' is displayed. Further down, there is a section titled 'Select PDF or DXF format' with an 'Output Type' dropdown menu set to 'PDF section'. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 53: The *Add Report* dialog box for creating a new *Sheathing Drawings* output.

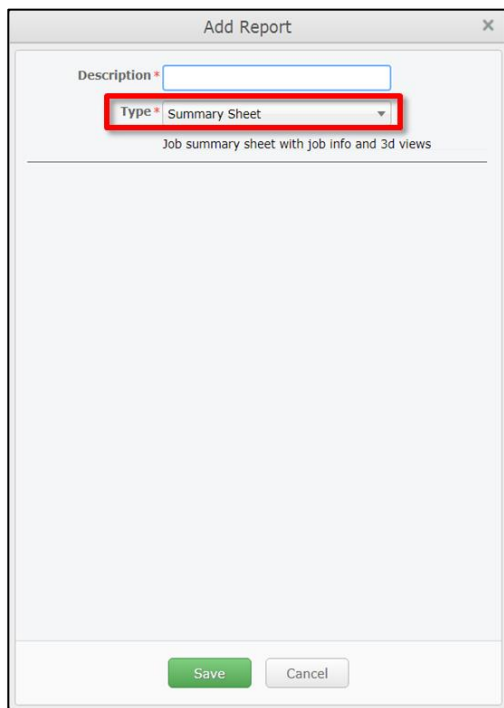
The image shows the 'Add Report' dialog box. At the top, there is a 'Description' text field. Below it is a 'Type' dropdown menu with 'Summary Sheet' selected. A red rectangle highlights the 'Type' dropdown. Below the dropdown, the text 'Job summary sheet with job info and 3d views' is displayed. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

Figure 54: The *Add Report* dialog box for creating a new *Summary Sheet* output.

SUMMARY SHEET

The *Summary Sheet* is a single page report, provided in PDF format, that contains the following information:

Drawing – A 2D representation of a roof's 3D model

Summary – The overall dimensions of the target roof.

Job Information – The *Job Information* section of this output lists the *Job Information* entered by the users into the *Jobs Tab* of the *Property Pane* for the given project. Even though the *Summary Sheet* itself cannot be customized, the data collected and listed on the *Jobs Tab* is completely customizable, so the contents of this section of the report will vary by organization.

Please see [Appendix G](#) on page 24 for an example *Summary Sheet*.

Creating Application-Specific Outputs

SKETCHUP .SKP FILE

Roofing Passport is designed to integrate with Trimble SketchUp software for companies that have traditionally used this application for some or all of their design processes. Now, users can take advantage of Roofing Passport's automated modeling capabilities, and then further refine their designs and outputs using SketchUp.

By creating a SketchUp output, users will be able to download a copy of their Roofing Passport 3D model – and all its associated data – in a file format that can be opened and edited in SketchUp.

To create a SketchUp output, simply select *SketchUp .SKP* from the *Type* drop-down list, and enter the desired name for this output in the *Description* field. Click on the *Save* button when you are done, to save the output and close the *Add Report* dialog box.

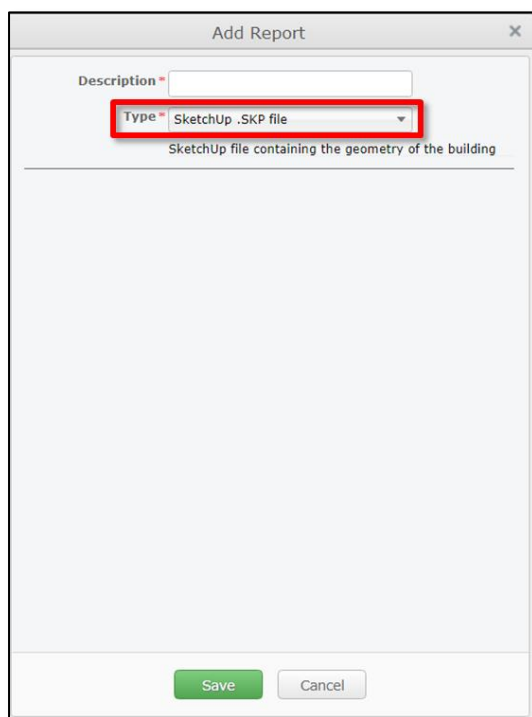


Figure 55: The *Add Report* dialog box for creating a new SketchUp File output.

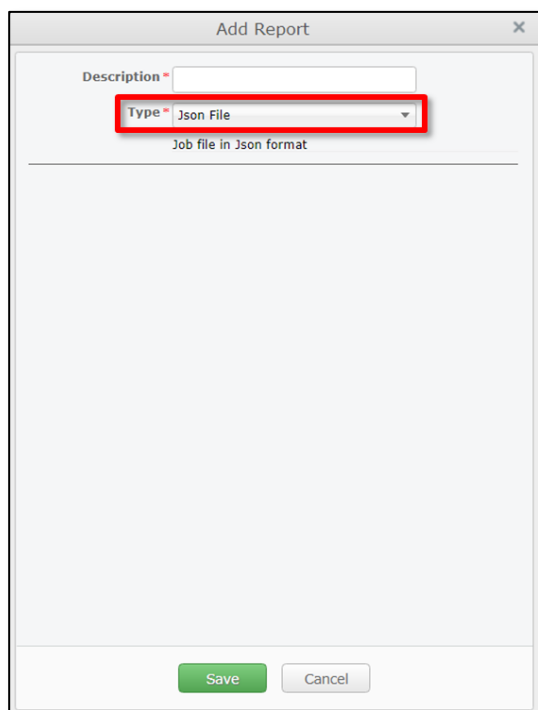


Figure 56: The *Add Report* dialog box for creating a new *JSON File* output.

JSON FILE

This output is used to store simple data structures and objects in JavaScript Object Notation (JSON); a standard data interchange format. It is primarily used for transmitting data between a web application and a server.

Appendix A: Simple Job Bid Template

	BID FOR METAL ROOFING YOUR COMPANY NAME Your Company Address Phone: (XXX) XXX-XXXX Fax: (XXX) XXX-XXXX Email:		Bid Date:{CurrentDate} Salesperson:{SalespersonName} Sales Phone:{SalespersonPhone} Sales Email:{SalespersonEmail}
---	---	--	---

JOB INFORMATION		CUSTOMER/OWNER INFORMATION	
JOB NAME:	{JOB-ProjectName}	CUSTOMER ID:	{JOB-CustomerID}
STREET ADDRESS:	{JOB-Address}	CUSTOMER/OWNER NAME:	{JOB-CustomerName}
CITY, STATE, ZIP:	{JOB-City} {JOB-State} {JOB-ZipCode}	PHONE:	{JOB-Phone}
TOTAL SQ FT:	{SFRoof}	EMAIL:	{JOB-Email}

MATERIAL	DESCRIPTION	NOTES	PRICING
Metal Product	{JOB-ProductSystem}		N/A
Sheathing	{JOB-RoofMaterial} {JOB-BasicColor}		{TotalSheathingPri}
Trim	{JOB-TrimColor}		{TotalTrimPrice}
Accessories			{TotalAccessoriesP}
		MATERIAL SUBTOTAL	{TotalMaterialPrice}
		LABOR	{TotalLaborPrice}
		FREIGHT	{TotalFreightPrice}
		SALES TAX	{SalesTax}
		TOTAL	{TotalPrice}

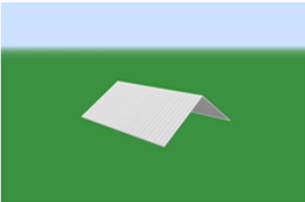
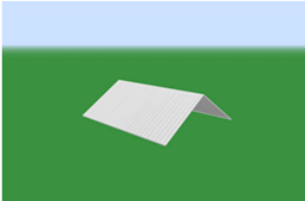
COMMENTS:

This is a quotation for the goods and services listed above. The pricing listed here is valid for a period of 30 days from the *Bid Date* listed in the top right corner of this document. Due to fluctuating material prices, the pricing listed here is subject to change if this document is signed and returned after 30 days.

THANK YOU FOR YOUR BID REQUEST!

Appendix B: Sales Quote

Building Quote								
QUOTATION FOR: {Customer Name} {Delivery Address} {Phone}	CONTACT NAME: {Contact} QUOTATION DATE: 3/29/2021	CONSTRUCTION: Post Frame DIMENSIONS: {BuildingWidth} {BuildingLength} {Ceiling Height}						
SPECIFICATIONS FOR {BuildingWidth}X {BuildingLength}X {CeilingHeight}								
POST FRAME PACKAGE:								
<u>Material Package</u> <ul style="list-style-type: none"> Pre-Engineered Wood Trusses ({Pitch}Pitch, {TrussSpacing} O/C) {PostMaterial} Eave Posts (8' O/C) {PostMaterial} Gable Posts (10' O/C) {SkirtBoardMaterial} Skirt Boards (1 Row) {GirtMaterial} Wall Girts (24" O/C) {PurlinMaterial} Roof Purlins (24" O/C) {TrussCarrierMaterial} Top Girt Exterior {WallColor} {WallSheathing} Steel Siding White 20" Ribbed 26 Gauge Steel Roof One Concrete Pad Per Post Hole Sac Crete For Fill Around Posts {Cupola} 								
<u>Doors & Windows</u> <ul style="list-style-type: none"> {DoorWindowList} Overhang Length {Overhang} {SoffitMaterial} 								
<u>Fasteners</u> <ul style="list-style-type: none"> 1 1/2 In. Metal To Wood Screws for Steel Wall, Roof Panels 4 In. Galv. Pole Barn Nails for Skirt Board Galvanized Steel Framing Nails 								
<table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 15%;">Subtotal</td> <td style="width: 10%; border-top: 1px solid black;">\$3,097.51</td> </tr> <tr> <td>Tax</td> <td>\$0.00</td> </tr> <tr> <td>GRAND TOTAL</td> <td style="border-top: 1px solid black;">\$3,444.01</td> </tr> </table>			Subtotal	\$3,097.51	Tax	\$0.00	GRAND TOTAL	\$3,444.01
Subtotal	\$3,097.51							
Tax	\$0.00							
GRAND TOTAL	\$3,444.01							

Appendix C: Comprehensive Job Data (Excel)

As pictured below, the *Complete Job Data* output is produced as a multi-tabbed Excel Workbook that contains all the job information entered into the Roofing Passport *Jobs Tab* on the first tab of the workbook, along with separate tabs for all of the Sheathing, Trim, Accessories, Labor and Freight required for a job. This output is standard and its contents cannot be edited or altered in any way.

Subsection	Cost	Taxable	Nontaxable	Weight
Sheathing	\$2,945.70	\$2,945.70	\$0.00	0
Trim	\$23.00	\$23.00	\$0.00	0
Accessories	\$103.04	\$128.81	\$0.00	101.04
Labor	\$346.50	\$0.00	\$346.50	0
Freight	\$0.00	\$0.00	\$0.00	0
Taxable:		\$3,097.51		
Sales Tax:	0.000%	\$0.00		
Nontaxable:		\$346.50		
Grand total:	\$3,418.24	\$3,444.01		101.04

Below, this example shows the contents of the *Sheathing Tab*; the second tab of information included in the Excel Workbook.

Usage	Sku	Material	Qty	Length	Pricing unit	Cost per unit	Price per unit	Extended cost	Extended price	Taxable	Weight per unit	Extended Weight
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 27'	RandomLength	\$81.00	\$81.00	\$81.00	\$81.00	\$81.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 26' 1"	RandomLength	\$78.25	\$78.25	\$78.25	\$78.25	\$78.25	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 25' 3"	RandomLength	\$75.75	\$75.75	\$75.75	\$75.75	\$75.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 23' 6"	RandomLength	\$70.50	\$70.50	\$70.50	\$70.50	\$70.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	49 22' 8"	RandomLength	\$68.00	\$68.00	\$3,332.00	\$3,332.00	\$3,332.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 20' 10"	RandomLength	\$62.50	\$62.50	\$62.50	\$62.50	\$62.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	2 20' 2"	RandomLength	\$60.50	\$60.50	\$121.00	\$121.00	\$121.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	32 19'	RandomLength	\$57.00	\$57.00	\$1,824.00	\$1,824.00	\$1,824.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 18' 8"	RandomLength	\$56.00	\$56.00	\$56.00	\$56.00	\$56.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 18' 4"	RandomLength	\$55.00	\$55.00	\$55.00	\$55.00	\$55.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 18' 3"	RandomLength	\$54.75	\$54.75	\$54.75	\$54.75	\$54.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 17' 8"	RandomLength	\$53.00	\$53.00	\$53.00	\$53.00	\$53.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	2 16'	RandomLength	\$48.00	\$48.00	\$96.00	\$96.00	\$96.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 15' 11"	RandomLength	\$47.75	\$47.75	\$47.75	\$47.75	\$47.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 15' 9"	RandomLength	\$47.25	\$47.25	\$47.25	\$47.25	\$47.25	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 14' 11"	RandomLength	\$44.75	\$44.75	\$44.75	\$44.75	\$44.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 14' 10"	RandomLength	\$44.50	\$44.50	\$44.50	\$44.50	\$44.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 14' 2"	RandomLength	\$42.50	\$42.50	\$42.50	\$42.50	\$42.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 13' 10"	RandomLength	\$41.50	\$41.50	\$41.50	\$41.50	\$41.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 13' 9"	RandomLength	\$41.25	\$41.25	\$41.25	\$41.25	\$41.25	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 13' 3"	RandomLength	\$39.75	\$39.75	\$39.75	\$39.75	\$39.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 12' 9"	RandomLength	\$38.25	\$38.25	\$38.25	\$38.25	\$38.25	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 12' 7"	RandomLength	\$37.75	\$37.75	\$37.75	\$37.75	\$37.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 11' 8"	RandomLength	\$35.00	\$35.00	\$35.00	\$35.00	\$35.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	2 11' 6"	RandomLength	\$34.50	\$34.50	\$69.00	\$69.00	\$69.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 10' 7"	RandomLength	\$31.75	\$31.75	\$31.75	\$31.75	\$31.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 10' 6"	RandomLength	\$31.50	\$31.50	\$31.50	\$31.50	\$31.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 10' 5"	RandomLength	\$31.25	\$31.25	\$31.25	\$31.25	\$31.25	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	9 10' 1"	RandomLength	\$30.25	\$30.25	\$272.25	\$272.25	\$272.25	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 9'	RandomLength	\$27.00	\$27.00	\$27.00	\$27.00	\$27.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	2 8' 10"	RandomLength	\$26.50	\$26.50	\$53.00	\$53.00	\$53.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 8'	RandomLength	\$24.00	\$24.00	\$24.00	\$24.00	\$24.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 6' 10"	RandomLength	\$20.50	\$20.50	\$20.50	\$20.50	\$20.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 6' 8"	RandomLength	\$20.00	\$20.00	\$20.00	\$20.00	\$20.00	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	2 6' 5"	RandomLength	\$19.25	\$19.25	\$38.50	\$38.50	\$38.50	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 6' 3"	RandomLength	\$18.75	\$18.75	\$18.75	\$18.75	\$18.75	1	0	0
Exterior Roof	SH16R-24-GR	16" Ribbed 24 Gauge	1 5' 4"	RandomLength	\$16.00	\$16.00	\$16.00	\$16.00	\$16.00	1	0	0

Appendix D: Custom Job Data (PDF)

The *Custom Job Data PDF* output is a highly-customizable one-page report that is available in both PDF and CSV formats. The PDF version shown below has been configured to include information from the *Job Tab*, along with materials information.

Job Data PDF w-material								
Job Number								
Job Name	1801 Redwood Ave							
Address	1801 Redwood Ave							
City	Boulder							
State	CO							
Zip Code	80304							
Requested Start Date								
Requested End Date								
Billing Address 1								
Billing Address 2								
Billing City								
Billing State								
Billing Zip Code								
Customer Name								
Customer Phone								
Customer Email								
Salesperson Name								
Salesperson Phone								
Salesperson Email								
Sheathing								
usage	description	sku	fullSku	length	colorCode	qty	uom	cos
Exterior Roof	20" Ribbed 26 Gauge	SH20R-26-{CC}	SH20R-26-GR	20.5833333333333	WT	54	RandomLength	54.55
Trim								
usage	description	sku	fullSku	length	colorCode	qty	uom	cos
Eave Edge	Eave-26G	EAVE-26G-{LF};-{CC}	EAVE-26G-10-WT	10	WT	9	PartLength	1
Gable Edge	Eave-26G	EAVE-26G-{LF};-{CC}	EAVE-26G-10-WT	10	WT	9	PartLength	1
Ridge Cap	Ridge Cap-26G	RC-26G-{CC};{LF}	RC-26G-10-WT	10	WT	5	PartLength	1
Accessories								
usage	description	sku	fullSku	length	colorCode	qty	uom	cos
- Entries	Joint Sealant	SEALANT{CC}	SEALANTWT	0	WT	1	Each	3
- Fasteners	#12 x 1" Pancake Head Self Tapping Screws (1000)	12x1PHSTS	12x1PHSTS	0	-base	2	Each	0.02
- Underlayment	Underlayment (4'x250' =1,000 SF)	UDLM4x1000	UDLM4x1000	0	-base	2	Each	50
SF	SF @ 6/12	P1SF06	P1SF06	0		1880		0
LF	LF GableEdge @ 6/12	P2LFGableEdge06	P2LFGableEdge06	0		82.3		0
Labor								
usage	description	sku	fullSku	length	colorCode	qty	uom	cos
- Labor	Labor Hour	M10	M10	0	-base	6	Each	55
Labor Markup				0	-base	1	Each	16.5
Freight								
usage	description	sku	fullSku	length	colorCode	qty	uom	cos

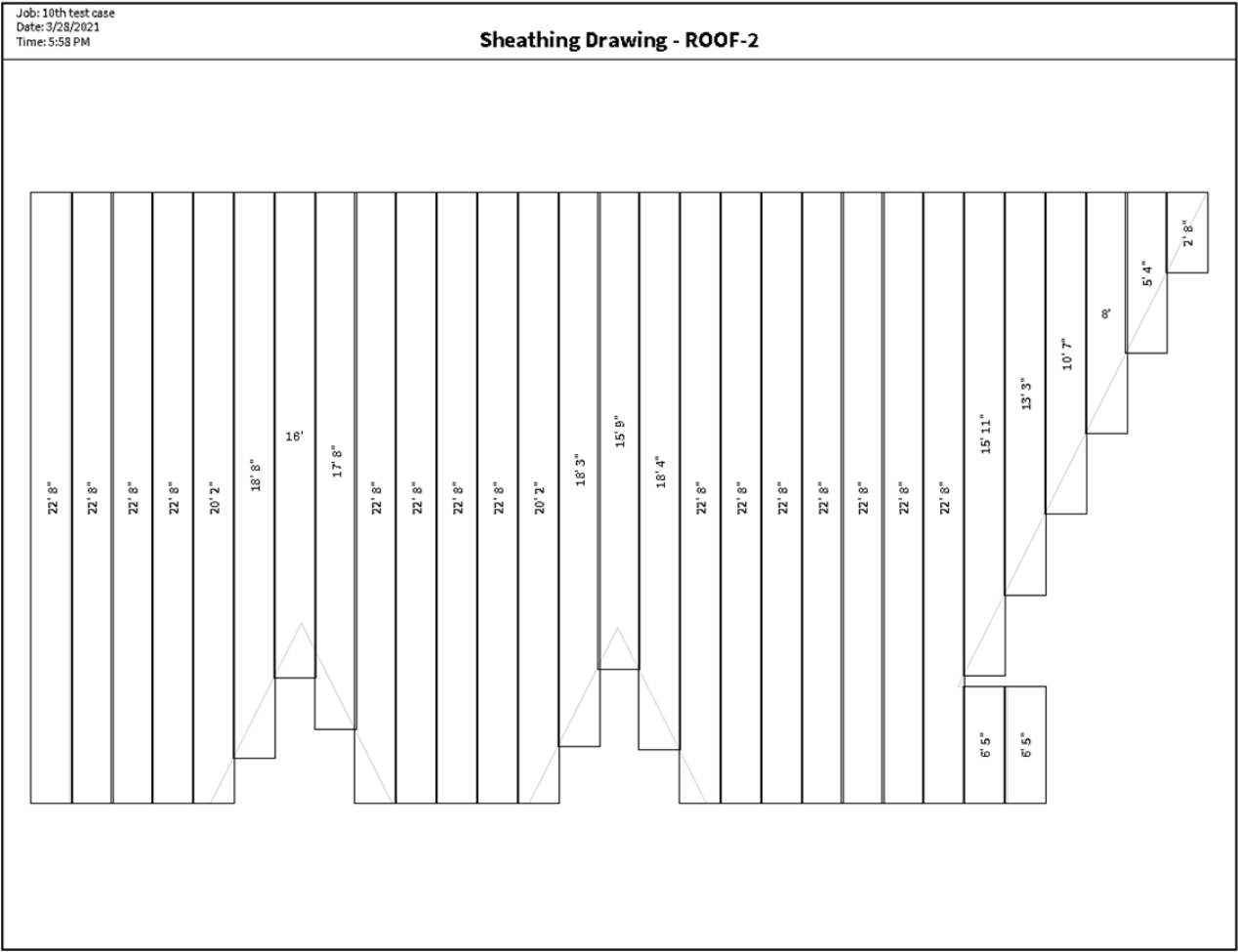
Appendix E: Custom Job Data (CSV)

The *Custom Job Data CSV* output is a highly-customizable one-page report that is available in both PDF and CSV formats. The CSV version shown below, which has been opened in Microsoft Excel, has been configured to include information from the *Job Tab*, along with materials information. Note that the tab name on the worksheet is the same as the *Job Name*. Each section of materials is separated by a header row for the sake of clarity.

Job Number	Job Name	Address	City	State	Zip Code	Requeste	Requested End Date	Billing Address 1	Billing Address 2	Billing City	Billing State	Billing Zip Code	Customer Name	Customer Phone Cu
1	1801 Redwood Ave	1801 Redwood Ave	Boulder	CO	80304									
Sheathing														
5	usage	description	sku	fullSku	length	colorCode	qty	uom	cost	price	error	lengthStr	lengthFt	lengthin
6	Exterior Roof	10" Ribbed 26 Gauge	SH20R-26-(CC)	SH20R-26-GR	20.5833333	WT	54	RandomLength		54.55		20' 7"	20	7
Trim														
9	usage	description	sku	fullSku	length	colorCode	qty	uom	cost	price	error	lengthStr	lengthFt	lengthin
10	Eave Edge	EAVE-26G-(LF)-(CC)	EAVE-26G-10-WT	10	WT		9	PartLength	1	1		10'	10	0
11	Gable Edge	EAVE-26G-(LF)-(CC)	EAVE-26G-10-WT	10	WT		9	PartLength	1	1		10'	10	0
12	Ridge Cap	RC-26G-(CC)(LF)	RC-26G-10-WT	10	WT		5	PartLength	1	1		10'	10	0
Accessories														
15	usage	description	sku	fullSku	length	colorCode	qty	uom	cost	price	error	lengthStr	lengthFt	lengthin
16	Entries	Joint Sealant	SEALANT(CC)	SEALANTWT	0	WT	1	Each	3	3.75		0'	0	0
17	Fasteners	#12 x 1" Pancake Head Self Tapping Screws	12x1PHSTS	12x1PHSTS	0	base	2	Each	0.02	0.03		0'	0	0
18	Underlayment	Underlayment (3x250' =1,000 SF)	UDLM4x1000	UDLM4x1000	0	base	2	Each	50	62.5		0'	0	0
19	SF	SF @ 6/12	P1SF06	P1SF06	0		1880		0	0		0'	0	0
20	LF	LF GableEdge @ 6/12	P2LFGableEdge06	P2LFGableEdge06	0		82.3		0	0		0'	0	0
Labor														
23	usage	description	sku	fullSku	length	colorCode	qty	uom	cost	price	error	lengthStr	lengthFt	lengthin
24	Labor	Labor Hour	M10	M10	0	base	6	Each	55	55		0'	0	0
25	Labor	Markup			0	base	1	Each	16.5	16.5		0'	0	0

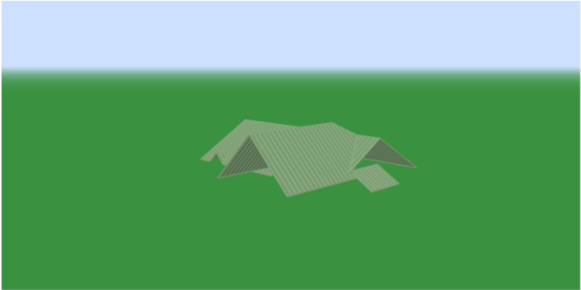
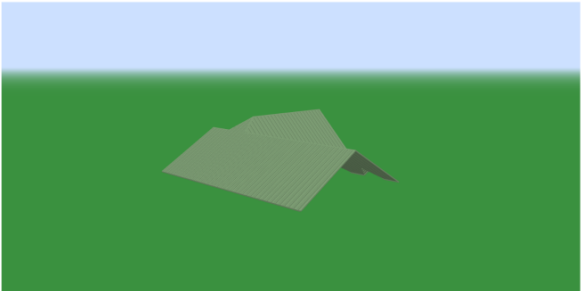
Appendix G: Sheathing Drawings

The *Sheathing Drawings* output is a multi-page PDF report that provides a one-page drawing for each section of a roof, and the layout of sheathing panels on that section. The example provided below shows the panel layout for the second section of the roof shown in *Appendix E*.



Appendix H: Summary Sheet

The *Summary Sheet* output provides basic roof dimension and job information, along with a 2D representation of the Roofing Passport 3D model. This output is commonly used as a cover sheet for the *Roof Layout* and *Sheathing Drawing* outputs used in the field.

Summary Sheet																																																							
<table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th colspan="2" style="text-align: left; padding: 2px;">Summary</th></tr></thead><tbody><tr><td style="width: 80%;">Width</td><td style="width: 20%;">0'</td></tr><tr><td>Length</td><td>0'</td></tr><tr><td>Ceiling Height</td><td>8'</td></tr><tr><td>Slab Depth</td><td>0'</td></tr><tr><td>Overhangs</td><td>0</td></tr><tr><td>Roof Pitch</td><td>4/12</td></tr></tbody></table> <table border="1" style="width: 100%; border-collapse: collapse;"><thead><tr><th colspan="2" style="text-align: left; padding: 2px;">Job Information</th></tr></thead><tbody><tr><td>Job Number</td><td></td></tr><tr><td>Job Name</td><td>10th test case</td></tr><tr><td>Address</td><td>1921 lanark court</td></tr><tr><td>City</td><td>virginia beach</td></tr><tr><td>State</td><td>VA</td></tr><tr><td>Zip Code</td><td></td></tr><tr><td>Requested Start Date</td><td></td></tr><tr><td>Requested End Date</td><td></td></tr><tr><td>Billing Address 1</td><td></td></tr><tr><td>Billing Address 2</td><td></td></tr><tr><td>Billing City</td><td></td></tr><tr><td>Billing State</td><td></td></tr><tr><td>Billing Zip Code</td><td></td></tr><tr><td>Customer Name</td><td></td></tr><tr><td>Customer Phone</td><td></td></tr><tr><td>Customer Email</td><td></td></tr><tr><td>Salesperson Name</td><td></td></tr><tr><td>Salesperson Phone</td><td></td></tr><tr><td>Salesperson Email</td><td></td></tr></tbody></table>	Summary		Width	0'	Length	0'	Ceiling Height	8'	Slab Depth	0'	Overhangs	0	Roof Pitch	4/12	Job Information		Job Number		Job Name	10th test case	Address	1921 lanark court	City	virginia beach	State	VA	Zip Code		Requested Start Date		Requested End Date		Billing Address 1		Billing Address 2		Billing City		Billing State		Billing Zip Code		Customer Name		Customer Phone		Customer Email		Salesperson Name		Salesperson Phone		Salesperson Email		<div style="text-align: center; height: 150px;"></div> <div style="text-align: center; height: 150px;"></div>
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