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# Setting Up Your Simple Bid Template

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## Purpose

The purpose of this document 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](mailto: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:

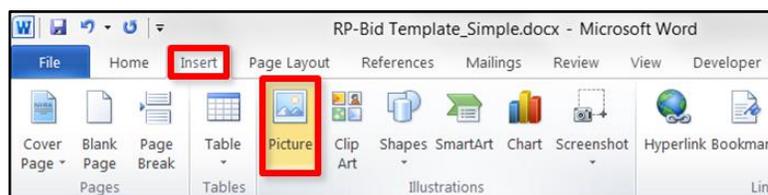
### CUSTOMIZING THE TEMPLATE

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 1** 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.



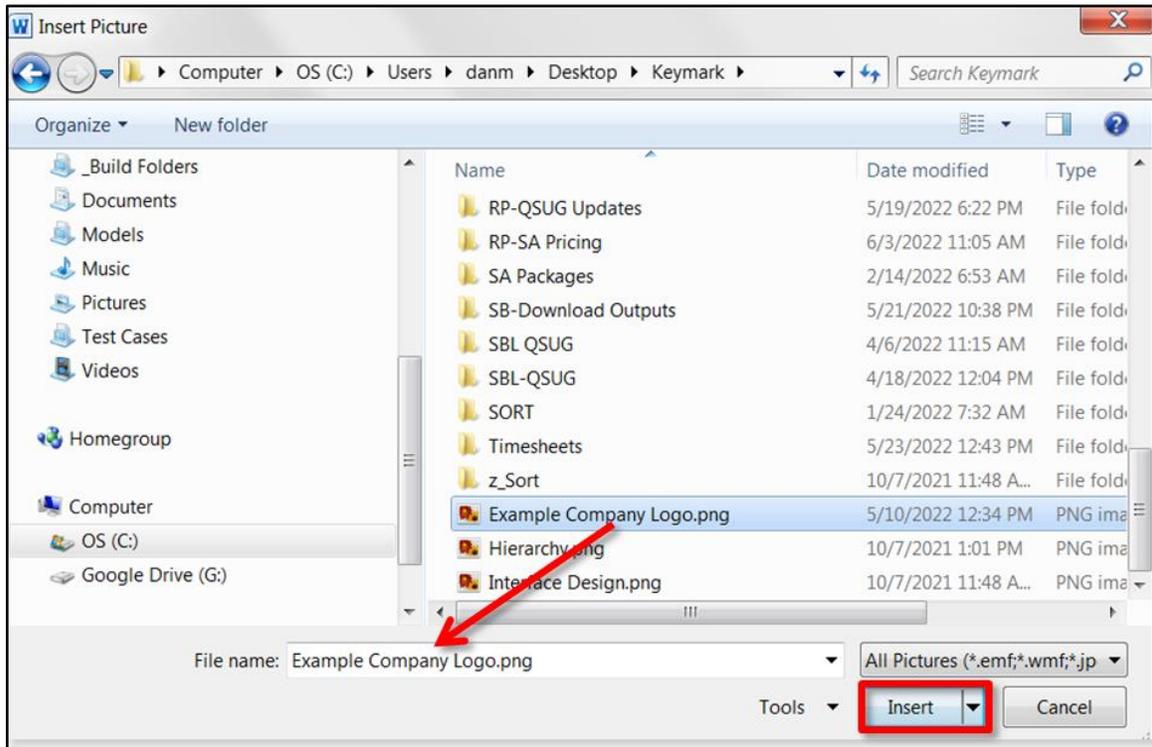
**Figure 1:** The Header Section at the top of the *Bid Template* is the only place you need to make any changes.

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 2**. This will open the *Insert Picture* dialog box shown in **Figure 3** on the following page.



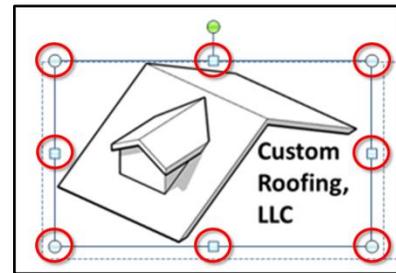
**Figure 2:** Click on the Picture button to insert your logo.

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 3**.



**Figure 3:** 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 4** at right.)



**Figure 4:** 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 5**. 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 5**.



**Figure 5:** 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

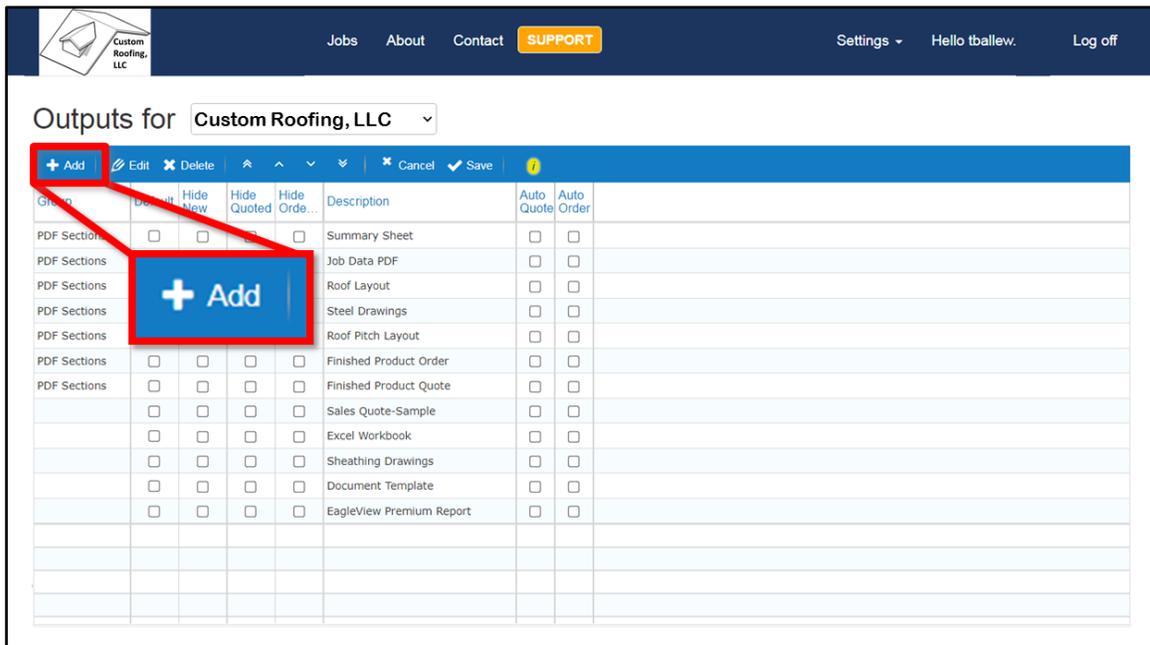
Now that your template's *Header Section* has been customized, the time has come to upload your modified document to the Roofing Passport database, for your users to access. To upload your template, complete the following steps in the order presented:

- 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 6** (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 7** shown on the following page.



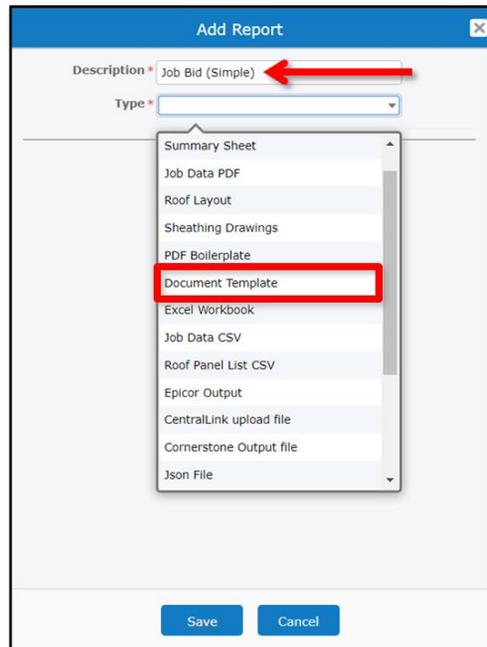
**Figure 6:** Select **Outputs** from the **Settings** menu.

- On the command toolbar on the *Outputs Administration* page, click on the **Add** button, as shown in **Figure 7** below.



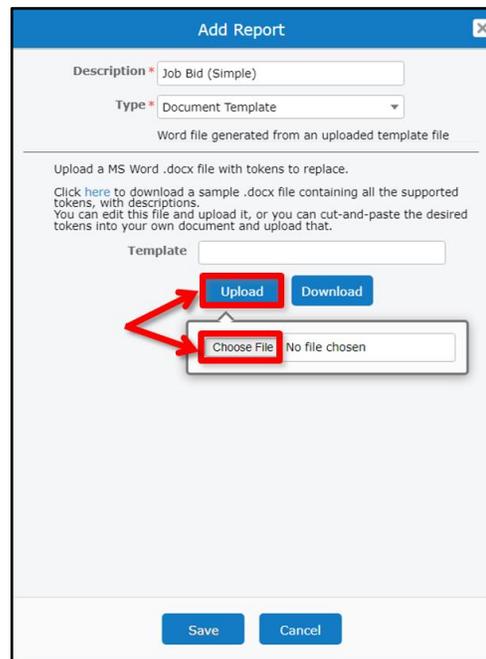
**Figure 7:** On the *Outputs Administration* page, click on the **Add** button to upload your new template.

- The *Add Report* dialog box pictured in **Figure 8** (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 9** on the following page.



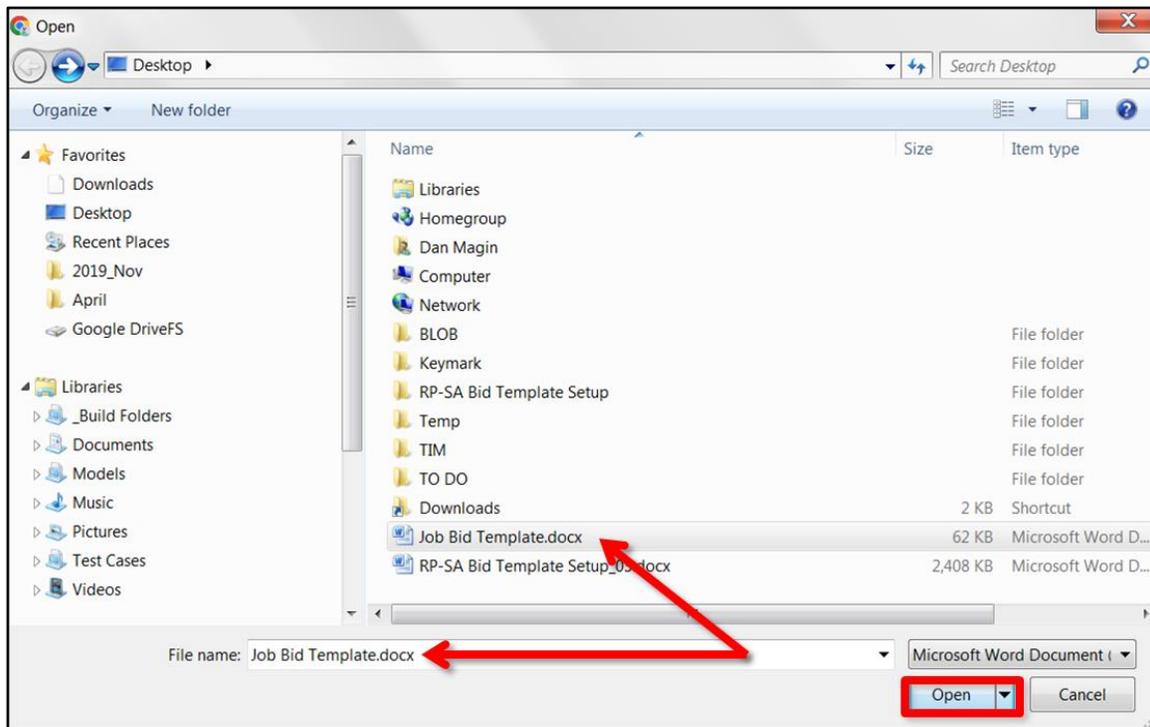
**Figure 8:** Type in a name for your template and select **Document Template** from the **Type** drop-down list.

- Now, in the *Add Report* dialog box, click on the **Upload** button (**Figure 9**) to initiate the upload process. The **Choose File** button will become visible. Click on the **Choose File** button.



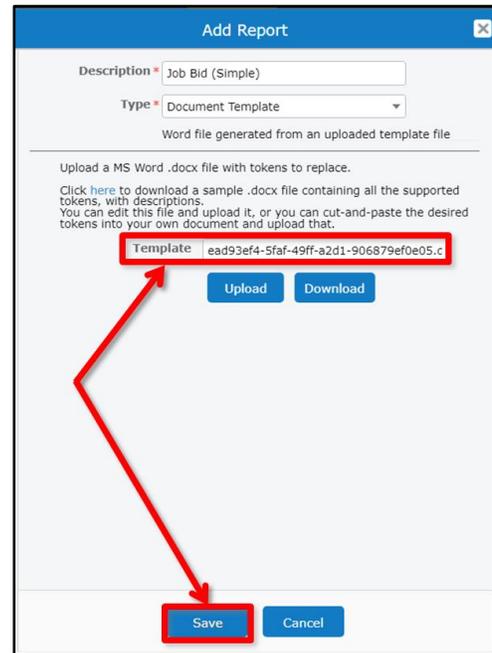
**Figure 9:** Click on the **Upload** button, and then the **Choose File** button to initiate the upload process.

- Once you click on the **Choose File** button, the Windows (or Mac) *Open* dialog box will appear. (See **Figure 10** 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 10:** Select your template file from its stored location and click on the **Open** button.

- Now, back in the *Add Report* dialog box (Figure 11, right), notice that your selected file appears in the *Template* field. Don't worry that the file name appears unintelligible. That is just the code Roofing Passport assigns to the file for tracking purposes "behind the scenes." Click on the *Save* button to complete the upload process and close the *Add Report* dialog box.



**Figure 11:** The *Template* field now indicates that a file has been selected and is ready to upload.

- Once the *Add Report* dialog box closes, you will be returned to your Roofing Passport *Outputs Administration* page, as pictured in Figure 12 at right. Don't worry about all the other buttons, knobs and checkboxes on this page for now. This is just an introductory document, and your template will work just fine as is. That said, be sure to hit the *Save* button before you leave the *Outputs Administration* page, or all your hard work will be lost! (**NOTE** – If you try to leave the *Outputs* page without saving your work, a warning message box will appear to remind you.) All that remains to be done is to check your uploaded template to make sure that it performs as expected.

Outputs for **Custom Roofing, LLC**

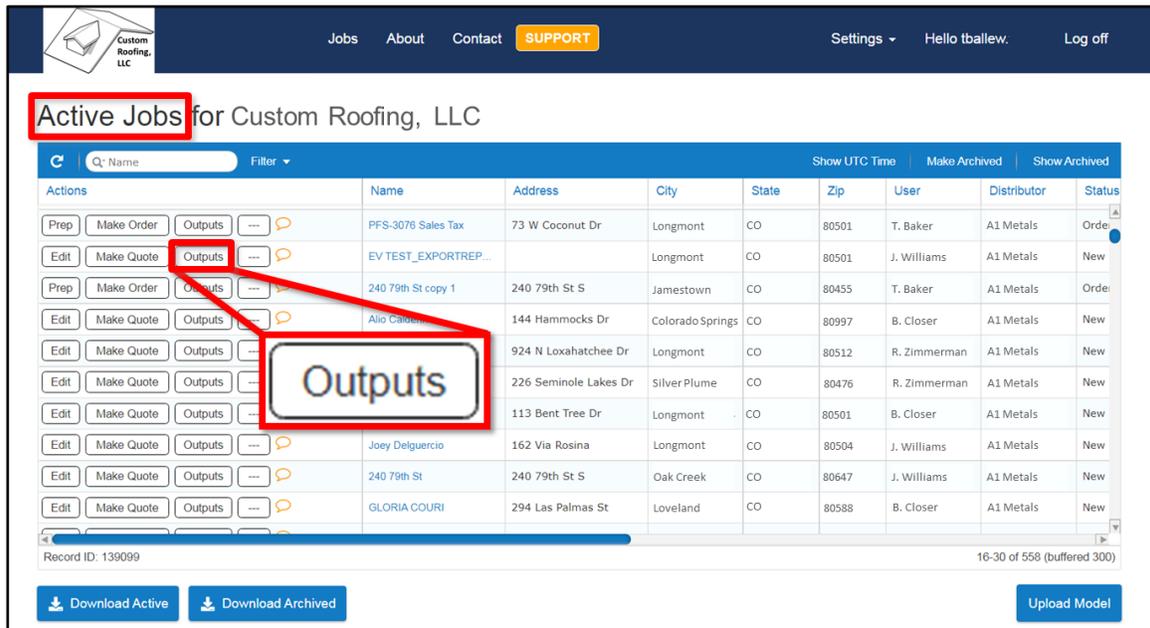
Group	Default	Hide New	Hide Quoted	Hide Order...	Description	Auto Quote	Auto Order
PDF Sections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Summary Sheet	<input type="checkbox"/>	<input type="checkbox"/>
PDF Sections	<input type="checkbox"/>	<input 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 12:** Your new *Job Bid Template* now appears in the list of *Outputs*.

## CHECKING TEMPLATE PERFORMANCE

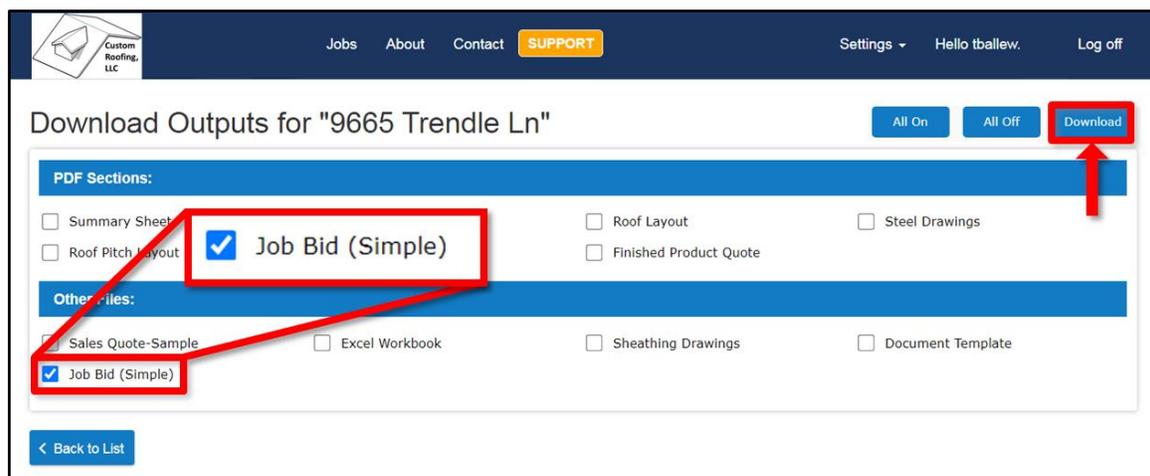
Now that your new *Job Bid Template* has been uploaded to Roofing Passport, we will generate a bid to make sure that everything is working properly. To check your template's performance, complete the following steps in the order presented:

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 13** below.



**Figure 13:** 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 14** below. 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.



**Figure 14:** Activate the checkbox next to the *Job Bid (Simple)* file and click on the *Download* button.

3. Navigate to the *Downloads* folder on your local computer and open your newly downloaded *Job Bid* file. Make sure that the information you supplied for the header of the document appears as anticipated. If you need to make any further adjustments, repeat the steps outlined in this document until you achieve the desired results.

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](mailto:support@keymark.com).

## Appendix: The Simple Job Bid Template

	<h3 style="margin: 0;">BID FOR METAL ROOFING</h3> <h3 style="margin: 0;">YOUR COMPANY NAME</h3> <p style="margin: 0;">Your Company Address</p> <p style="margin: 0;">Phone: (XXX) XXX-XXXX      Fax: (XXX) XXX-XXXX</p> <p style="margin: 0;">Email:</p>	<p style="margin: 0;">Bid Date: {CurrentDate}</p> <p style="margin: 0;">Salesperson: {SalespersonName}</p> <p style="margin: 0;">Sales Phone: {SalespersonPhone}</p> <p style="margin: 0;">Sales Email: {SalespersonEmail}</p>
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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!**