Setting Up Your Simple Bid Template

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.

Step-by-Step Instructions

For our purposes here, we will use the *Bid Template* shown in the <u>Appendix</u> 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 <u>here</u>.
- 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.)
- 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.

7. 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.

8. All the remaining sections of the *Sample Bid Template* are set up to be completed automatically by Roofing Passport, using <u>tokens</u> 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.
- 2. 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.

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

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+ Add	Edit 🗙	Delete Hide	* Hide	A V	Cancel V Save	e i	Auto			
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PDF Sections		г A	aa		Steel Drawings					
PDF Sections					Roof Pitch Layout					
PDF Sections					Finished Product Order					
PDF Sections					Finished Product Quote					
					Sales Quote-Sample					
					Excel Workbook					
					Sheathing Drawings					
					Document Template					
					EagleView Premium Report					

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

- 4. 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.]
- 5. 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.

	Add Report 🛛 🗙							
Description *	Job Bid (Simple)							
Type *	Document Template							
	Word file generated from an uploaded template file							
Upload a MS Word	Upload a MS Word .docx file with tokens to replace.							
Click here to down tokens, with descr You can edit this f tokens into your c	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.							
Tem	Template							
Template Upload Download Choose File No file chosen								
	Save Cancel							

- Figure 9: 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 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.

6. 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.

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Organize New folder		8	🛛 🔹 🔂 🔞
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	keymark		File folder
🛯 🥞 Libraries	📙 RP-SA Bid Template Setup		File folder
Delta Solders	👢 Temp		File folder
Documents	III III		File folder
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Figure 10: Select your template file from its stored location and click on the Open button.

8. 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.

9. 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 ~							
+ Add 🛛 🖉	Edit 🗙	Delete	*	~ ~	🗧 🔺 Cancel ✔ Save	i	
Group	Default	Hide New	Hide Quoted	Hide Orde	Description	Auto Quote	Auto Order
PDF Sections					Summary Sheet		
PDF Sections					Job Data PDF		
PDF Sections					Roof Layout		
PDF Sections					Steel Drawings		
PDF Sections					Roof Pitch Layout		
PDF Sections					Finished Product Order		
PDF Sections					Finished Product Quote		
					Sales Quote-Sample		
					Excel Workbook		
					Sheathing Drawings		
					Document Template		
					EagleView Premium Report		
					Job Bid (Simple)		

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.

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Name	Address			Show UTC T	Time Make Arel		
Name	Address				INIC INICIAL INICIAL	nived Show	Archived
		City	State	Zip	User	Distributor	Status
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EV TEST_EXPORTREP		Longmont	со	80501	J. Williams	A1 Metals	New
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Alio Calden.	144 Hammocks Dr	Colorado Springs	со	80997	B. Closer	A1 Metals	New
	924 N Loxahatchee Dr	Longmont	со	80512	R. Zimmerman	A1 Metals	New
utputs 📗	226 Seminole Lakes Dr	Silver Plume	со	80476	R. Zimmerman	A1 Metals	New
	113 Bent Tree Dr	Longmont ·	со	80501	B. Closer	A1 Metals	New
Joey Delguercio	162 Via Rosina	Longmont	со	80504	J. Williams	A1 Metals	New
240 79th St	240 79th St S	Oak Creek	со	80647	J. Williams	A1 Metals	New
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Figure 13: Choose a job to work with and click on the Outputs button to the left of that job.

 The Download Outputs page will open for the selected job. Locate your newly uploaded Job 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.

Custom Roofing, LLC	Jobs About Co	ntact SUPPORT	Settings - Hello tballew. Log c	off
Download Output	ts for "9665 Trend	lle Ln"	All On All Off Downloa	ad
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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.

Appendix: The Simple Job Bid Template



JOB INFORMATIONCUSTOMER/OWNER INFORMATIONJOB 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
		-	
			(T-1-10-1-10-1-1)
		MATERIAL SUBTOTAL	{TotalMatenalPrice}
		LABOR	{TotalLaborPrice}
		FREIGHT	{TotalFreightPrice}
	1	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!