
Setting up and Maintaining Builder Accounts

As a Roofing Passport Systems Administrator, you will use *Builder Accounts* to manage the various user groups for which you are responsible. A *Builder Account* can be used to represent **any type of user group**: *Builder, Contractor, Supplier, Distributor*, or any other unique collection of Roofing Passport users. *Builder Accounts* are used to manage a group's:

- Materials availability and pricing
- Access to a variety of Roofing Passport features and functions
- Ability to view and/or edit various data fields
- Ability to customize the Roofing Passport interface
- Ability to edit *Framing Rules, Packages and Outputs*

Parts of the Builders Page

All Roofing Passport *Builder Accounts* are managed using the *Builders* page. To open the *Builders* page, log in to Roofing Passport and, from your *Jobs* page, click on the *Settings* menu and select *Builders*. A *Builders* window, like the one in Figure 1 below, will open. Please take a moment to review the various parts of the *Builders* page:

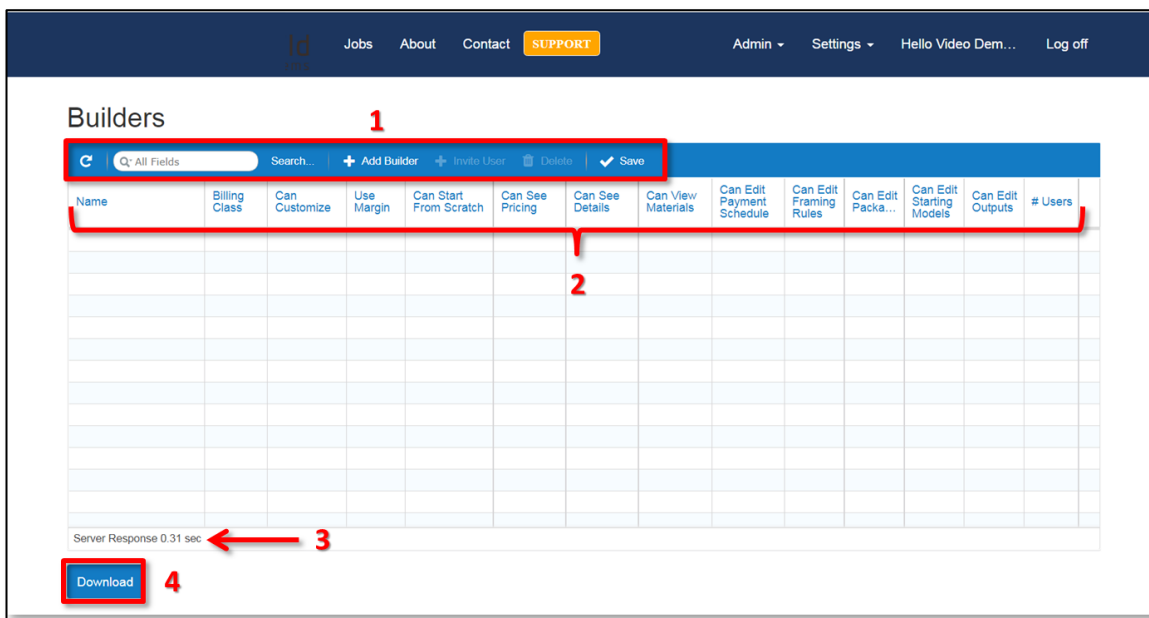


Figure 1: The *Builders* page is used to manage Roofing Passport privileges for groups of users.

1. The *Builders* page **Command Toolbar** provides quick access to the most commonly used functions:
 - **Refresh** – Clicking on the *Refresh* button updates the list of *Builder Accounts* displayed on the *Builders* page, to reflect any changes made since the last refresh operation.

- **Search** – System Administrators may use the `Search` function to locate *Builder Accounts* based on entered criteria.
 - **Add Builder** – System Administrators will click on this button to add a new *Builder Account* to Roofing Passport.
 - **Delete** – Clicking on the `Delete` button will erase the selected *Builder Account* from Roofing Passport.
 - **Save** – Clicking on the `Save` button keeps all changes made on the *Builders* page since the last `Save` operation.
2. The **Builders Table column headers** parse all *Builder Account* information into its various components. (The information contained in each of these columns is explained in the section of 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 your *Builder Accounts List*.

Creating a New Builder Account

To create a new *Builder Account* click on the `Add Builder` button on the toolbar at the top of the *Builders* page, as pictured in Figure 2 at right. Clicking on this button will open the *Create Builder* page shown in Figure 3 on the following page.

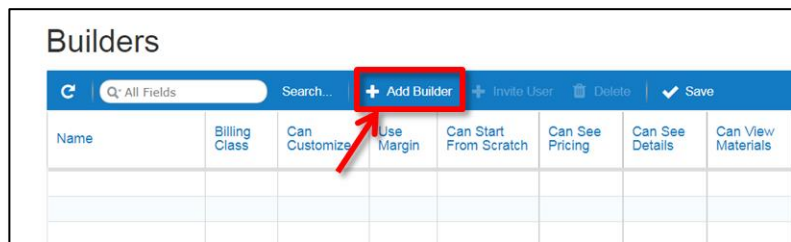


Figure 2: The `Add Builder` command button on the *Builders* page.

As you can see in Figure 3 (below), the *Create Builder* page has one field in which you will enter the `Name` to be assigned to your new *Builder*. (We have entered the `Name` *My Test Builder* for this example.) The rest of the page consists of a series of checkboxes that are used to enable (or disable) a variety of functions that may be assigned to a new *Builder*. As a new Roofing Passport Systems Administrator, we highly recommend that you:

- 1) Enter a `Name` for your new *Builder* in the `Name` field
- 2) Accept the system defaults for all of the checkboxes
- 3) Click on the `Create` button at the bottom of the page to complete the process of creating your new *Builder*.

For those who wish to explore the meaning behind these default settings, the paragraphs that follow immediately below provide a brief explanation of each of the fields on the *Create Builder* page, and the functionality they represent.

Figure 3: Most Roofing Passport features are made available to a new *Builder Account* by default.

- **Name** – Enter a unique Name for your new *Builder Account*. So that the Name can be easily displayed in Roofing Passport’s pages, we recommend that you limit the Name of your *Builder Account* to no more than 25–30 characters. Spaces are permitted, however, we request that you do not use any of the following special characters, as they may interfere with the proper functioning of Roofing Passport: question marks (?), quotation marks ("), forward or backward slashes (/ \), opening or closing brackets (< >), asterisks (*), vertical bars or pipes (|), colons (:), or paragraph marks (¶).
- **CanHaveBuilders** – Enable this checkbox to allow “downstream” System Administrators to create “child” *Builder Accounts*.
- **Can See Pricing** – When this checkbox is enabled, users belonging to this *Builder Account* are granted the ability to view pricing information displayed at the top of each *Edit* page, as shown in Figure 2 below.

JOB LIST	Edit Job "101 Oak Street"	Configured Price \$3,747.46	Total Linear Feet 889	Total Squares 26
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Figure 4: Users are granted the right to view pricing information via the *Can See Pricing* checkbox.

- **Can See Details** – When this checkbox is enabled, users belonging to this *Builder Account* are granted the right to view the *Job Details* page by clicking on a Job Name in the *Jobs List*.

- **Can Customize** – Enable this checkbox to allow users in the associated *Builder Account* to make changes to models using the Roofing Passport *Edit* page.
- **Can Edit Payment Schedule** – When this checkbox is enabled, downstream System Administrators are granted permission to edit *Payment Schedules* in the *Settings* menu.
- **Can Edit Framing Rules** – When this checkbox is enabled, the downstream Systems Administrator for the selected *Builder Account* is granted permission to edit the *Framing Rules* for his/her group.
- **Can Edit Packages** – Enable this checkbox to grant the downstream Systems Administrator for the new *Builder Account* to edit *Packages* for his/her group.
- **CanEditStartingModels** – This feature is not available in the current version of Roofing Passport.
- **Can Edit Outputs** – When this checkbox is enabled, downstream System Administrators are granted rights to make changes to *Outputs* under the *Settings* menu.
- **CanEditJobDisclaimer** – When this checkbox is enabled, downstream System Administrators are granted rights to customize the *Job Disclaimer* that is displayed.

FOUR EXTRA COLUMNS

As described below, there are four columns that appear in the list on the *Builders* page that are not present on the *Create Builder* page. Following is a brief description of these four columns and the function of each:

- **Can View Materials** – When this checkbox is enabled, downstream System Administrators are granted the right to view *Materials* under the *Settings* menu. (Downstream Systems Administrators are *Builders* who create and manage “Child” *Builder Accounts* for their customers.)
- **Use Margin** – When this checkbox is enabled, Roofing Passport will calculate the difference between *Cost* and *Price* as the *Margin* rather than *Markup*.
- **# Users** – Read only, this field displays the total number of users who have registered with Roofing Passport using the designated *Builder Account*.

Inviting Users to Join a New Builder Account

To invite potential users to Roofing Passport, you will email each one a link to a web page that will allow them to complete the registration process.

1. The first step in inviting a new user is to “impersonate” the new *Builder Account* from which the email invitation is to be sent. To do this, log in to Roofing Passport using your Systems Administrator account and navigate to your *Jobs List* page.

2. In the upper right-hand corner of your *Jobs List* page, click on the Hello [Your Name] button to open the Roofing Passport *Manage* page, as pictured in Figure 5 below.

Manage.

Change your account settings

Fullname Robert Plant

Email rplant@zeppelin.com

Username Bob

Company Name Musical Roofing

Phone Number 4235551212

Password [Change your password](#)

Distributor KeyMark

[Save Changes](#)

Your User Rights

- ✓ CanOverrideErrors
- ✓ IsDistributorAdmin
- ✓ IsMaterialAdmin
- ✓ CanViewDistributorJobs
- ✓ CanViewAdminReports
- ✓ CanEditMaterials
- ✓ IsSiteAdmin
- ✓ CanSeePricing
- ✓ CanEditDistributor
- ✓ CanEditModels

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Figure 5: Click on the drop-down arrow next to *Distributor* to select a different Builder Account.

3. Near the bottom of the *Manage* page, click on the drop-down arrow next to *Distributor*, and select the *Builder Account* to which you wish to invite new users.

NOTE – Do not let use of the term “*Distributor*” throw you here. In addition to your own *Supplier Account*, this drop-down list will also contain all of the *Builder Accounts* that you have created in Roofing Passport.

4. Now that your new *Builder Account* has been selected, return to the **Settings** menu at the top of the page and select **Users** . The **Roofing Passport Users** page will open, as pictured in Figure 6 below. Click on the **Add User** button, and the **Register Link** message box will open.

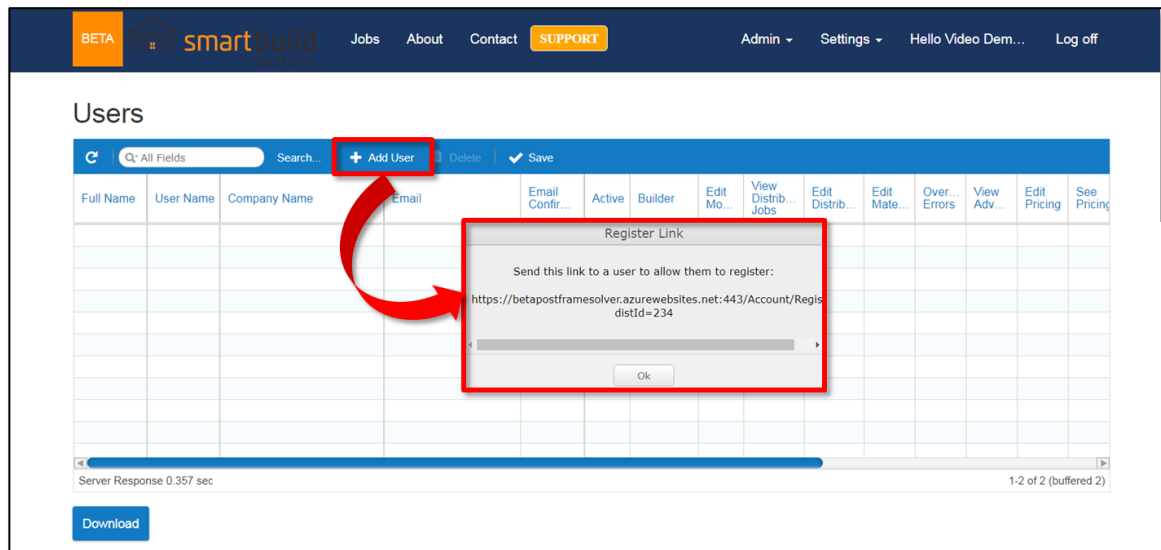


Figure 6: Click the Add User button to get a registration link.

5. Copy the link provided in the *Register Link* message box and paste this link into the email invitation you will send out to each new user associated with the selected *Builder Account*. That's all there is to it!

Searching Existing Builder Accounts

Systems Administrators who are working for large *Suppliers* may have a great number of *Builder Accounts* to manage. If such is the case, you may wish to *Search* for a *Builder Account* rather than scrolling through your list of entries. To *Search* for an existing *Builder Account*, perform the following actions:

1. Click on the *Search* button on the toolbar at the top of the *Builders* page to open the *Search* dialog box pictured in Figure 5 below.
2. In the *Search* dialog box, click on the button just to the right of *Name*, and select the portion of the *Builders* *Name* that you wish to *Search* for (*Is*, *Begins*, *Contains*, *Ends*).
3. In the blank field provided, type in the *Builder Name*, (or *Name* fragment) for which you wish to *Search*, and then click on the blue *Search* button at the bottom of the dialog box. Roofing Passport will list all *Builder Accounts* that match the criteria you entered.

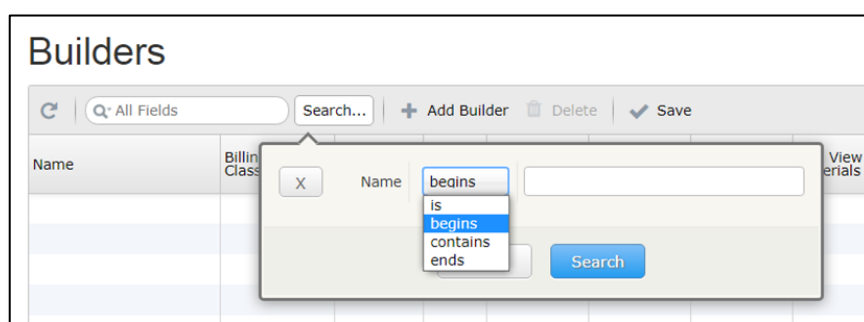


Figure 7: The *Search* drop-down on the *Builders* page.

Editing an Existing Builder Account

To edit an existing *Builder Account*, navigate to your *Builders* page and make changes to the account by clicking on the fields to enable or disable the checkboxes for each column as desired. Be sure to click on the *Save* button when you are done making changes.

Deleting an Existing Builder Account

Perform the following actions to delete an existing *Builder Account*:

1. Go to the menu at the top of the page you are on and click *Settings* → *Builders* to open the *Builders* page.
2. Locate the *Builder Account* you wish to delete and click on that row to select it. With the *Builders* *Account* now selected, click on the *Delete* button. The *Delete Selected Distributor* dialog box will open. (Once again, ignore use of the term "Distributor" here; it is the selected *Builder Account* that we will be deleting.)
3. Click on the *Yes* button to complete the process of deleting the selected *Builder Account*. Click on the *No* button to back out of the process without deleting the selected *Builder Account*.

