
Overview of Roofing Passport's Default Outputs

The most important feature of any software application is the outputs it provides. Right out of the box, Roofing Passport's outputs include a variety of 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 out of the box, there are virtually limitless options for creating your own custom Roofing Passport outputs.

The purpose of *this* document is to provide you with an overview of Roofing Passport's default outputs. Links to additional help files are provided for those who seek further details on the various subjects presented here. Below is a table showing the basic properties of each of Roofing Passport's 10 default outputs. This table is immediately followed by a brief description of each of these 10 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	Bid with Contract	DOCX	DOCX	Yes - Full
4	Roof Layout Drawing	N/A	PDF, DXF	Yes - Limited
5	Sheathing Drawings	N/A	PDF, DXF	No
6	Materials List	CSV	CSV	Yes - Limited
7	Materials List by Category	XLSX	XLSX	Yes - Limited
8	Finished Product Order	PDF	PDF	Yes - Limited
9	Job Summary Sheet	DOCX	PDF	Yes - Full

OUTPUT DESCRIPTIONS

BID OUTPUTS

Roofing Passport provides three different bid templates in Microsoft Word format, all of which can be fully customized by you, the *Systems Administrator*.

1. **Simple Bid** – The *Simple Bid* output includes all the basic information required for submitting a customized bid to a potential customer. (Click [here](#) to view an example of the *Simple Bid* output.)
2. **Bid with Payment Schedule** – Includes all data in the *Simple Bid* output along with a section that details the customer's payment-schedule. (Click [here](#) to view a copy of the *Bid with Payment Schedule* output.)

3. **Bid with Contract** – Includes all data in the *Simple Bid* output along with the addition of a section to which an organization may add its legal contract for the provision of goods and services. (Click [here](#) to view an example of the *Bid with Contract* output.)

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):

4. **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.)
5. **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

6. **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. See *Figure 3* below for further information. (Click [here](#) to view an example of the *Materials List* output.)
7. **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.)
8. **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

9. **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."

To access and customize your Roofing Passport outputs, go to the menu bar at the top of your home page and click on **Settings** → **Outputs**. This will open the System Administrators *Outputs* page shown below.

<div> + Add Edit Delete ⏶ ⏴ ⏵ ⏷ ✖ Cancel ✔ Save i </div>							
Group	Default	Hide New	Hide Quoted	Hide Ordered	Description	Auto Quote	Auto Order
PDF Sections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Roof Layout Drawing	<input type="checkbox"/>	<input type="checkbox"/>
PDF Sections	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Sheathing Drawings	<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"/>	Job Summary Sheet	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Simple Bid	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bid w/ Drawing	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bid w/ Payment Schedule	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Bid w/ Contract	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Materials List	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Materials List by Category	<input type="checkbox"/>	<input type="checkbox"/>

NOTE – For detailed information about all aspects of the System administrators *Outputs* page and its uses, please see [Setting Up Outputs](#).

Roofing Passport's four default bid outputs and *Job Summary Sheet* are fully customizable Microsoft Word documents. You are free to use these default outputs in their existing form, to modify them as you like, or to create your own Word-based outputs from scratch.

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 use Roofing Passport's programming tokens to customize your outputs please see the help document [Universal Tokens for Creating Custom Outputs](#).

Customizing Other Outputs

All non-Word related outputs are customized directly within the Roofing Passport interface. To customize a non-Word output, go to 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 that presents you with the specific customizations available for that output. For example, Figure 3 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](#).

Figure 2: Example *Edit Report* dialog for a Word-based output.

Figure 3: *Edit Report* dialog box for the *Materials List* output.