Using the Roofing Passport Help System

All user-help documentation and videos for Roofing Passport can be accessed from within the application. There are <u>five</u> different types of help available, to provide you with immediate guidance on the specific the task at hand: *ToolTips*, *Help Boxes*, *Help Windows*, *Help Documents*, and *Help Videos*. Followings is a brief description of each of these help features.

close a Help Box.

ToolTips — When your mouse hovers briefly over an <u>executable</u> <u>button</u> in the Roofing Passport interface, the application will display a brief, text-based description of the basic function of that button. For example, hovering over the Print button displays the text shown in Figure 1.



Figure 1: ToolTip for the Print button.

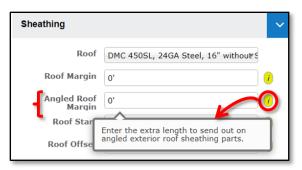


Figure 2: Help Box explaining what to enter into the Roof Margin field on the *Basic Tab*.

Help Windows – As pictured at right (Figure 3), the upper-right-hand corner of each page within Roofing Passport includes a Help button that will open a *Help Window*. Click on this icon to open the *Help Window* for the current page. (See example *Help Window* below.)



Help Boxes – *Help Boxes* provide brief, descriptive information about each of the fields on the *Property*

Tabs used to define the specifications for a job. To

access a Help Box, click on the yellow "i" icon to the

immediate right of that field, as shown in Figure 2 at left. Click on any blank area within the interface to

Figure 3: Click on the Help button to open the Help Window for the page you are currently on.

postframesolver.blob.core.windows.net/beta-help-files/RP-Prep-3d.html **Prep for Order PURPOSE** Once a job has been bid and successfully landed, the next step is to confirm the roof's dimensions in the field, prior to ordering materials. When the field-verified dimensions become available, you may need to make changes to the Materials List and other Outputs that were generated as part of Roofing Passport's *Quote* process. These changes are made using the *Prep* for Order process, and can include modifications to the: · Quantity of materials • Color of all panel and trim materials · Specifications listed on the Job Tab NOTE: Changing the length and quantity of materials can only be accomplished using the Prep for Order process and cannot be made anywhere else within the applicati Since there multiple aspects of a job that may require review and/or modification, the Prep for Order page provides four (4) different Modes; each offering users a different set of tools for reviewing and/or modifying a job: 1. 3D View Mode - The default Mode when you first enter the Prep for Order page, this is the Mode you are in right now! (See below for details.) 2. Job Review Mode – On the Prep for Order page, Job Review Mode is primarily used to change the quantity of materials to be ordered for the job 3. Drawings Mode - On the Prep for Order page, Drawings Mode is primarily used to 4. View Geometry Mode - This Mode is used to review the dimensions of your model via an interactive line drawing and summary data

Each Help Window provides a general Overview of the specific features and functions available on that page, along with a Further Information section that provides links to help documents and videos with detailed instructions on how to use each specific feature or function.

Help Documents – Provided in PDF format and accessed via links in the Help Windows, Roofing Passport Help Documents provide everything from general overview information, to step-by-step instructions on how to complete a specific task. When you click on a document link in a Roofing Passport Help Window, the corresponding PDF document will open in the exiting window frame. To navigate from the PDF file back to your original Help Window, hold down the Alt key on your keyboard and press the back-arrow key (←).

Help Videos – Also accessed via links in the Roofing Passport *Help Windows*, our YouTube *Help Videos* are provided on a broad range of topics. YouTube videos open in their own window, and do not affect the *Help Window* from which the YouTube link was accessed.