



7 Steps to Adopt Your New CRM

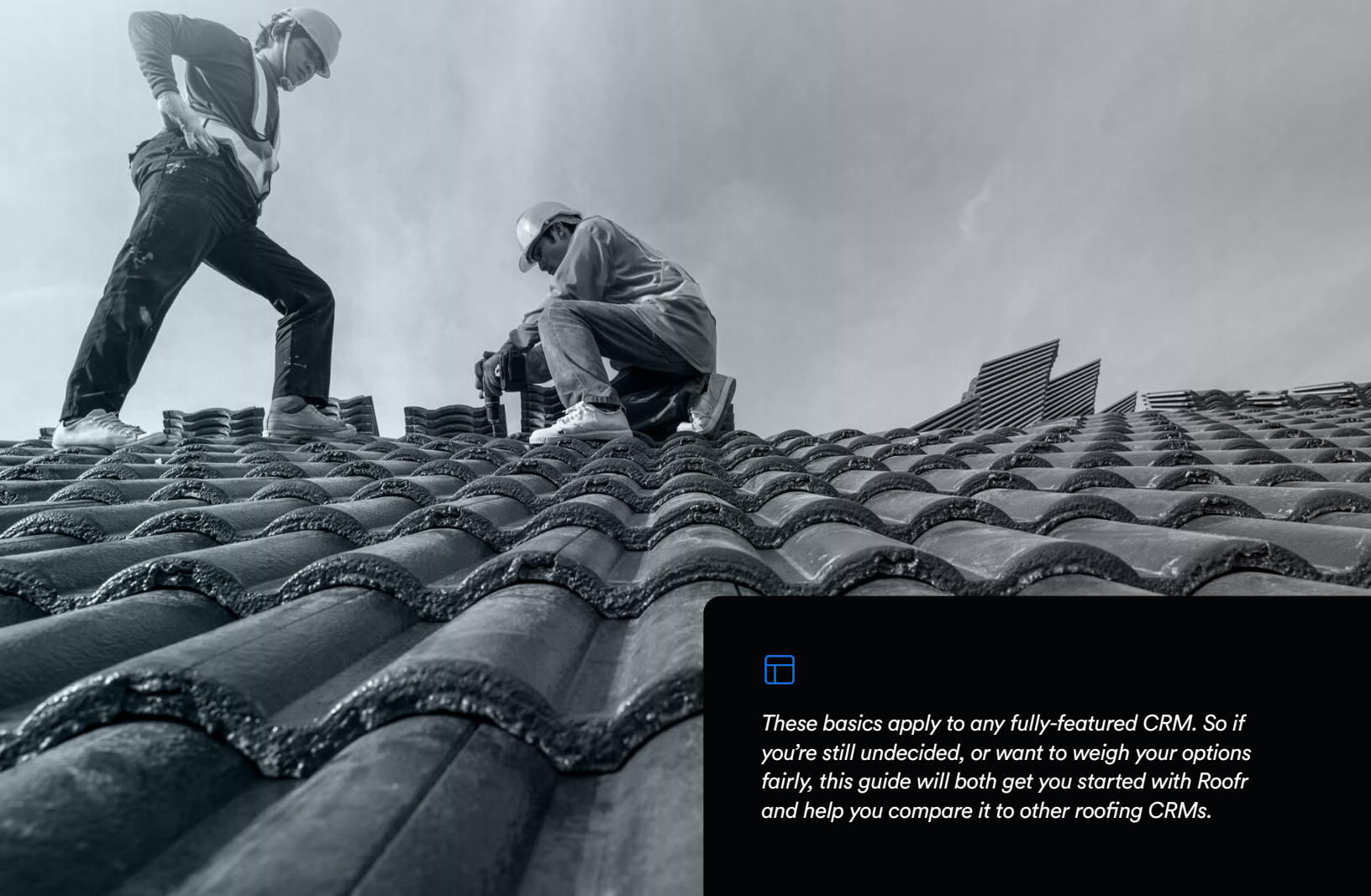
You've pulled the trigger and picked the CRM that's going to help you build and scale your roofing business. Congrats!

...AND...NOW WHAT?

Whether you're using **Roofr** or another CRM, the first step after signing up is *overwhelming*.

The potential is massive, but where to start?
What to set up first? What's the approach?

Don't overthink it: our data shows that taking **these seven clear, easy steps** will put your sea legs under you. This is based on real Roofr user engagement — folks who take these steps get much more value out of their CRM and grow their business more easily.



These basics apply to any fully-featured CRM. So if you're still undecided, or want to weigh your options fairly, this guide will both get you started with Roofr and help you compare it to other roofing CRMs.

USING THIS GUIDE

Ready to get serious about your software usage?

Don't cherry pick. Each step is key to getting the most from your CRM.

And they're all really simple, so it's not a big time investment. Going through the basics should only take you about half an hour.

Start with these steps. All seven of 'em.
And we promise you'll be soaring in no time.

Important

**Adopting any new process takes time.
Give yourself space to do it right.**

Start with a “test” job, or a low-pressure one with flexible timelines. Take it slow. Think of it like the first level in a video game. It's teaching you how to play.

OK, LET'S GET STARTED

STEP 1

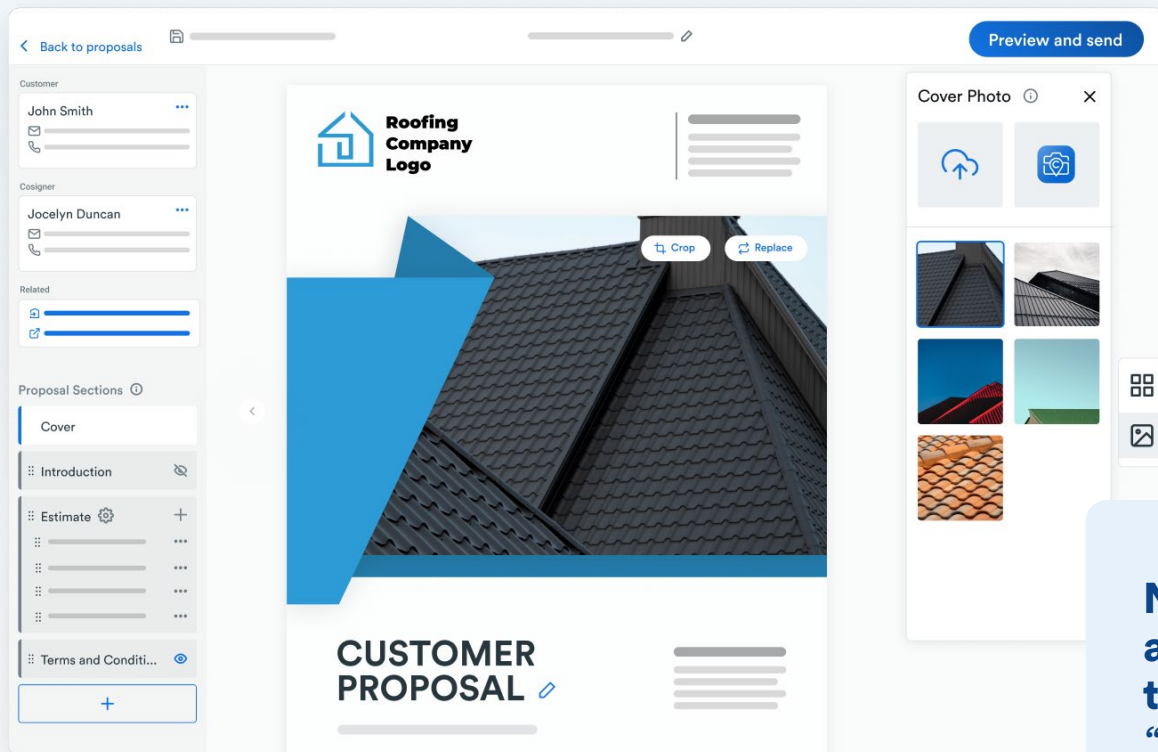
Create your first proposal

Work starts with a proposal.
So does your CRM.

It doesn't need to be perfect right away: you can always tinker with your proposal templates later.

The first thing is just to start.

Get into the proposal builder, customize it for the job at hand, double-check the details, then hit send. And just like that, your first step's complete.



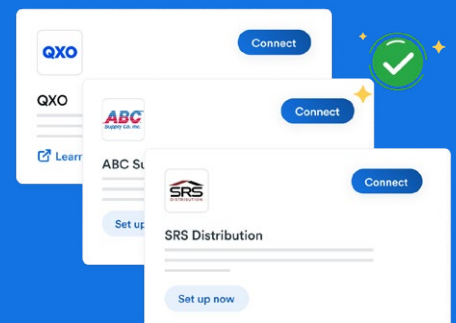
Now *that's*
a proposal
that'll get a
“wow.”



Follow these tips:

- Link your supplier (ABC, QXO, or SRS) for **LIVE material pricing**.
- Auto-pull **materials and labor** from any measurement report.
- Add **Good/Better/Best options** and add-ons as you need 'em.
- Upload your **logo and images** so it matches your business' look.
- Add **personalized discounts** by percentage OR dollar amount.

For more detail, [read our help article](#) or check out some [sample proposals](#).



Note:

Roof Reports aren't covered here, but you can order accurate roof measurements using satellite or drone imagery in minutes.

Depending on your Roofr plan, they're priced as low as \$13 each and can be ready in as few as two hours.

Ready within *two* hours?!

Edit

Send

CUSTOMER PROPOSAL

Details

Estimate

Roof repair			
Materials			
Total			\$2,541.00

STEP 2

Create a simple set of proposal **line items**

You get it now — proposals are powerful.

And once your templates are set up, customizing and sending them to customers happens FAST. Only time-consuming part left is filling in the line items each time.

Right?

NOPE! That's what your **Catalog**'s for.

The screenshot shows the 'Catalog' interface for 'Jojo Roof Co.' with the email 'jojowilkinsroofing@g...'. The left sidebar contains navigation links: Jobs (Beta), Calendar, Performance (Beta), Tools, Instant Estimator (with a crown icon), Measurements, Proposals, Material Orders, Invoices, Payments, Manage, Contacts, Email & SMS (with a crown icon), and Catalog (highlighted). The main area is titled 'Catalog' and includes a search bar, 'Columns' dropdown, and 'Reorder items' link. Below the search bar, there are buttons for 'Unselect all', 'Add to template', 'Download as CSV', and 'Delete'. A table lists 12 items, with 4 selected (checked). The table columns are: Name, Measurement, Coverage, Unit Cost (\$), Waste (%), Unit, Tax (%), and Actions. The items are: GAF Timberline HDZ, GAF WeatherWatch, Metal Roofing, Valley Flashing, Step Flashing, Counter Flashing, Wall Flashing, Ridge Capping, Vents, Starter Strips, and IKO Stormshield.

	Name	Measurement	Coverage	Unit Cost (\$)	Waste (%)	Unit	Tax (%)	Actions
<input checked="" type="checkbox"/>	GAF Timberline HDZ	Pitched roof area (squares)	60 ft	8.00	0	bundle	25	Edit ...
<input checked="" type="checkbox"/>	GAF WeatherWatch	Pitched roof area (squares)	60 ft	400	0	bundle	25	Edit ...
<input type="checkbox"/>	Metal Roofing	Pitched roof area (squares)	60 ft	15.00	0	bundle	25	Edit ...
<input type="checkbox"/>	Valley Flashing	Pitched roof area (squares)	60 ft	17.00	0	bundle	25	Edit ...
<input checked="" type="checkbox"/>	Step Flashing	Pitched roof area (squares)	60 ft	10.00	0	bundle	25	Edit ...
<input checked="" type="checkbox"/>	Counter Flashing	Pitched roof area (squares)	60 ft	10.00	0	bundle	25	Edit ...
<input type="checkbox"/>	Wall Flashing	Pitched roof area (squares)	60 ft	20.00	0	bundle	25	Edit ...
<input type="checkbox"/>	Ridge Capping	Pitched roof area (squares)	60 ft	6.00	0	bundle	25	Edit ...
<input type="checkbox"/>	Vents	Pitched roof area (squares)	60 ft	17.00	0	bundle	25	Edit ...
<input type="checkbox"/>	Starter Strips	Pitched roof area (squares)	60 ft	15.00	0	bundle	25	Edit ...
<input type="checkbox"/>	IKO Stormshield	Pitched roof area (squares)	60 ft	10.00	0	bundle	25	Edit ...

Add line items there, whether you use them all the time or once in a blue moon, and you can drop them into future proposals anytime.

Line items include materials, but also labor, service fees, or miscellaneous costs.

Note:

Scope of Work line items live here too!

The Catalog is your master library, so anything you want in a quote or invoice later will come from here. That lets you add in common explanations whenever you need 'em instead of rewriting for every job.

A few minutes upfront saves you countless hours in the long run.

Now, the next time you make a proposal, **everything's one click away**: shingles, ridge capping, flashing, vents, whatever you need.

It saves you time and helps you get proposals to customers faster. And [itemized quotes make customers happier too](#), since it shows exactly what they're spending their money on. No need to answer "what does this include?"... it's all on the page.

GAF Shingles 1

All changes saved.

Type: Material

Name

GAF Shingles 1

Description

Description here...

Measurement ⓘ

Eaves length +2 more

Coverage ⓘ

60sqft

Unit Cost (\$)

10.00

Waste (%)

Material

Labor

Other

roofr

Lesson progress

0%

Why Catalog, Proposals, and Templates Matter 03:43

Building Your Catalog 05:40

Building, Editing, and Customizing Proposal Templates 07:14

Creating Proposals from Job Cards and 01:35

03:59



Check out our Roofr Academy lesson videos for help with building your Catalog.

So, let's start by adding a few of your most-used line items. You can do this a few ways:

1. **Add items manually:** Perfect for one-offs or new additions as you need them.
2. **Import roofing systems:** Insta-add Atlas, BP, CertainTeed, GAF, IKO, or Owens Corning.
3. **Add or update in bulk:** Got info in Excel or Sheets? Upload a .CSV to Roofr.
4. **Supplier Integrations:** We'll cover this in Step 6. Hold off on adding your full catalog for now, as you may want to link line items to your supplier's later.



Upload new catalog

Upload a new CSV file from the template.



Import from a roofing system

Select the roofing system you'd like to import into your catalog.

STEP 3

Create your first task

You're trucking along, and maybe you're starting to see the vision. But don't stop yet.

The real beauty of a full-featured CRM isn't just in creating awesome proposals, or in any one feature. It's about how it **connects everything together** — your whole pipeline (or workflow). Not just the customer-facing stuff, but you and your crews too.



So now, it's time to create your first task:

- From your Roofr dashboard, click the “+ New” button and select Task.
- The Tasks sidebar appears. At the bottom, type in anything from your to-do list.
- Click “Due Date” to set yourself a deadline. Then hit the “Add Task” button.

Obtain building permit from the city

Add task

Assignee Due date Blocking
Link a job

Now, here's why to use this over pen and paper: (or whatever checklist app you're currently using)

• Assign tasks:

Once your team's on Roofr, assign tasks to your crew. Train them to check their tasks instead of waiting for your texts.

• Link tasks to jobs:

Attach each task to its job card, so everyone knows exactly what needs doing, for which customer, and when. No confusion.

• Get everyone on the same page:

Letting everyone use their own system? Doesn't work. Keep every task in ONE place so the whole team sees what's up.

All your project management woes, solved.
[Read more about tasks and job cards here.](#)

*Holy sh!t,
it's that easy.*

⚠ Note:

You've probably noticed by now that the “Jobs” tab in your Roofr account shows you the status of every Job Card at a glance: *New lead*, *Appointment scheduled*, *Proposal sent*, and so on, all the way to *Job completed*.

It's smart to check this board often. Get used to actioning jobs that sit in one place for too long. That's how you keep things moving, make sure no roof gets forgotten, and build a consistent business that customers trust in.

STEP 4

Create your first invoice

Alright, we know what you want next: where does getting paid come in? So let's jump ahead a bit.

Thankfully, this next step's just as easy as the last. You could always create an invoice from scratch, either in Roofr or on another platform, but why re-type ALL the info *again*?



Check it out:

- Create an invoice from a Job Card OR a Proposal.
> Either way, it takes just two clicks.
- Add the due date and confirm the customer's billing info.
- Edit as needed: change or hide line items, or throw on a discount.
- Email it to the customer right from Roofr.

Done. And you didn't need to switch to some other system first, or bring in an accountant, or go digging through the 500+ unread emails in your inbox for the right email to reply to.

Now, that invoice lives in Roofr with the rest of your business, meaning:

- It'll never get lost. It's linked to a specific job and customer.
- Nothing gets missed. Upfront job status means no risk of forgetting to send.
- You'll get paid. [Set up Roofr Payments](#) and customers can pay online through Roofr.

Ray's Roofing Pros
1621 Ocean Drive
Capital City, Ohio 43932
www.RaysRoofingPros.biz
contractor lic #923231-2B
[Edit company details](#)

#10009
Invoice

BALANCE DUE
\$32,709.00

ISSUE DATE: July 3, 2023
DUE DATE: July 3, 2023

JOB ADDRESS
674 Chancery Lane, Perfectville, TN 39398

BILLING CONTACT
Sarah Jones
[Edit](#)
sarah.jonesthesecond@gmail.com (555) 555-1234

Invoice items [Edit items](#)

Item

GAF Marathon 3-Tab Shingle
GAF Asphalt Roof Shingles are glass-fibre reinforced asphalt shingles.

Wall Flashing

GAF Steel Valley Fishing

Customer totals
The total is the amount your customer will be billed

Subtotal	\$17,181.25
Tax	\$0
Total	\$17,181.25

Memo and footer
These are customer facing but will not be shown if left empty.

MEMO TO CUSTOMER

FOOTER



Throw away
that ancient
file cabinet.

Ready to Send

 **roofr**
PAYMENTS

⚠ Hey!

You're more than halfway through.

Remember, you don't need to master all of this at once. Think long-term, not tomorrow. By understanding how all these systems work together, you'll be equipped to use your CRM's full functionality instead of just scratching the surface.

Grab a coffee, take a breather,
then keep going.

STEP 5

Create your first material order

You've nailed the customer side and know how to set tasks for your team. Now it's time to order the materials for the job.

Here's usually where you'd call up Joey from your supplier. *Right?*

Joey's a good guy, and he'll take care a'ya.

Except he likes to chat. So what started out as an order for shingles is now you hearing about Joey's home life and little Harper's soccer game and how she scored more goals than the other kids and *don't they just grow up so fast?* What should've been a short call was a full 45 minutes out of your day.

Great.

Oh, and Joey wrote it down wrong, so you need to call him back...

That's just one example of why you need a material ordering process that is efficient, consistent, and baked in with everything else.

Enter your CRM.

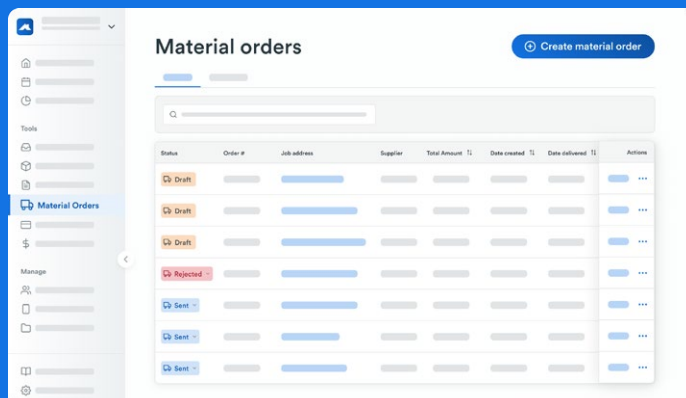
The screenshot shows a web interface for creating a material order. At the top, there's a navigation bar with 'Back to jobs', 'All changes saved', 'Edit material order', and buttons for 'Draft', 'Preview', and 'Finalize order'. Below the navigation bar, there's a section for 'Material order' with a placeholder for a logo and a dropdown menu for the address, currently showing '35 N Calle Cesar Chavez'. A note indicates 'Prices last updated 8 days ago'. The main section is titled 'Materials' and contains a table with columns: Item, Option, Unit, Unit cost (\$), Qty, and Total (\$). The table has four rows, each with a 'Select' dropdown menu. A dropdown menu is open for the first row, showing three options: 'Classic Black and Grey', 'Classic White', and 'Terracotta'. At the bottom of the table, there are buttons for 'Add item', 'Import from proposal', 'Cancel', and 'Save'. Below the table, there's an 'Estimated total' section with a note: 'The final cost of this material order will be based off of final pricing and availability from your supplier'. The total is listed as '\$480.00'.

Item	Option	Unit	Unit cost (\$)	Qty	Total (\$)
	Select				
	Classic Black and Grey				
	Classic White				
	Terracotta				

Estimated total
The final cost of this material order will be based off of final pricing and availability from your supplier
Total \$480.00

Place orders in seconds:

- Open up any won proposal, click the options menu (...), and choose Create material order.
- The materials will auto-populate — you can edit and adjust.
- Add in a unique PO number to keep yourself organized.
- Finally, click Send to email your supplier! Just as with proposals and invoices, you can send this out without ever leaving Roofr.



Feels good. The building blocks are coming together.

Once again, you avoided duplicating work. That initial proposal you made has now been made into a job card (for project tracking), a material order, and when ready, an invoice.

Everything's more accurate, since the numbers are always copied over instead of being re-done manually. And you have linked records of every document that your team can reference anytime.

⚠ BTW:

We won't get into it here, but you can [create work orders](#) from proposals or material orders too. That way, your crew knows exactly what they're doing.

No risk of arriving on site with the wrong stuff.



STEP 6

Add your first **supplier**

OK, so material ordering's fine,
but nothing **THAT** special, right?

After all, you still have to track material pricing as it changes. You still have to call Joey up to ask him for the latest info... don't you?

Hold on. **Here's where the magic happens.**

The supplier updated the costs

☒ Use updated costs: subtotal \$1,119.38 Latest pricing

☐ Use current costs: subtotal \$1,009.38 Proposal pricing

Back to proposal Confirm



Add in your supplier, and watch live pricing and stock availability sync up with your Roofr account.

- Choose from ABC Supply, QXO, or SRS Distribution.
- Log into your account to connect it to Roofr.
- Sync up each line item with your supplier's corresponding offer.
- Or, upload a full .CSV file with matching SKUs or Item Numbers.

[How-to guides and troubleshooting are here!](#)

Take the time to properly connect your supplier items, so they always appear in your Catalog and Material Orders later.

1

Select supplier

2

Add branch locations

3

Add contact information

Select a supplier from the list or bring your own supplier



Add my own
supplier

OK, that's
f**kin' cool.

⚠️ Wanna see it in action?

If you're curious about supplier integrations, or came from a CRM that doesn't have them, [book a demo](#) anytime! Our team would love to show you how well they work.



Now when you make material orders in Roofr, you'll see the latest pricing — not general public pricing. Whatever you've negotiated with the supplier. And you'll see what's in stock, so you can better plan, estimate, and set customer expectations without going back on your word later.

Sorry Joey, we'll chit-chat another time. I've got a business to run.

STEP 7

Create your first automation

Last big step to take before you're onboarded.

Warning: this one might feel like getting unplugged from the Matrix. It unlocks a whole universe of possibilities! You might even start seeing ones and zeroes and sh*t.

You might imagine your new CRM as a neat little assembly line. Your initial proposal goes down the line to become a job card, a material order, a work order, and an invoice. Plus any other tweaks, follow-ups, and insurance info needed along the way.

Efficient, organized, on track, but it's still work for you to shuffle everything from step to step... for now.

+ Automation

The screenshot shows a modal window for creating an automation. At the top, there's a toggle switch and a text input field labeled "Automation name". Below this, the interface is divided into three sections: "If..." with a "Select trigger" dropdown, "Then..." with a "Select action" dropdown, and "Frequency" with a label "This automation happens..." and two radio buttons: "Every time" and "Only once per job". At the bottom left is a "Cancel" link, and at the bottom right is a "Save automation" button.

Automations use if/then statements, such as:

IF I use Roofr, THEN my life will get 1,000x easier.

Time to put some automations in place. They keep things moving so you can spend your valuable time growing your business.

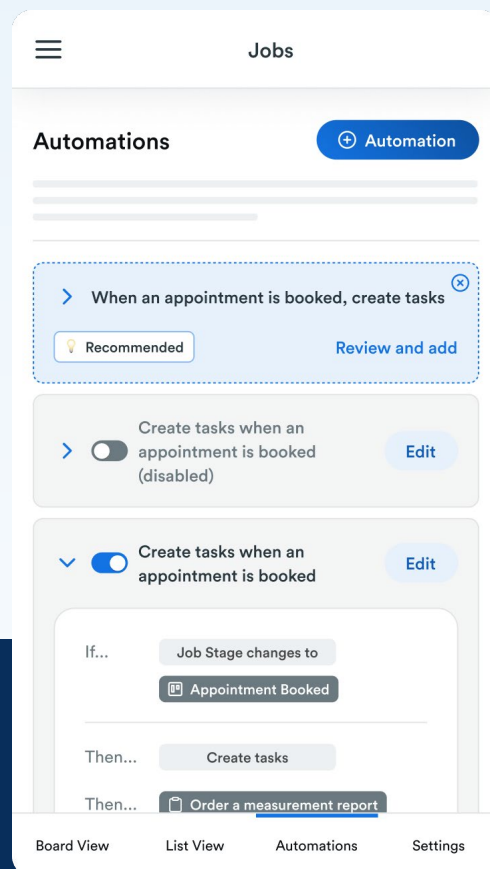
Click on through to the [Automations manager](#). You can create your own from scratch or pick from presets.

Examples include:

- When a job stays in New lead for 24 hours, **send an automatic follow-up email**.
- When a proposal is emailed out, **change job status to Proposal sent**.
- When an appointment is created, **send an automatic text to the customer**.

⚠ It's bigger than status updates

Once you're comfy with automations, you can sync Gmail and Google Calendar to Roofr, set up SMS texting, and automate EVERY reminder, follow-up, and review request.



**See the potential?
We're just scratching
the surface.**

If you've ever wondered how to be as professional and communicative as a big business with a large team, without blowing out your budget — *this is how.*

YOU DID IT!

Your Graduation Ceremony

Got all seven steps complete? Congrats on sticking with it! By exploring these seven CRM fundamentals, you've made an investment in the future of your business.

You've seen what the tech can do. And now, you have a clearer direction and a roadmap for what's ahead. No need to stumble ahead blindly — you should know exactly where you're headed, even if it takes time to get there.

Now, dive in. Get wild with it! The more optimized your setup, the faster you'll grow. And with only 1 in 4 modern roofing companies using advanced tech, you now have a HUGE advantage over the competition.



Take the keys, go for a spin. *You've got this.*

(Just... don't forget to give Joey a call every so often. The guy's lonely. He may be a chatterbox, but his heart's in the right place.)

⚠ Got any questions?

Email support@roofr.com. Our awesome support crew will get your issues solved in a jiffy.

Eager to learn more?

Between our years of [Masterclass webinars](#), [podcasts](#), and [articles](#), find all you need to grow your business.

Visual Learner?

If you prefer talking over reading, [our implementation team is here to help](#). They offer weekly education sessions and support to get you set up with every tool covered in this guide (and much more).

Join an education session while you work through onboarding, or get the basics set up for yourself before asking them for in-depth support.

Whatever you need, we've gotcha covered.



“

The automations, integrations, and task management have streamlined our operations, while the support has been outstanding.

Whether through Nicole or the chat team, we've always received timely, knowledgeable assistance. In our experience, that level of consistency and dedication is rare in this industry.”

- **Melissa Rogers**, C2C Roofing & Restoration



“

I've implemented a lot of software in my career, so I know that support from the software company is often the difference between a great or a mediocre software solution.

Jessica has been amazing since we first signed on: coordinating a lot of the implementation heavy lifting, and always being super available and knowledgeable via email or video calls.”

- **Mark Schmidt**, COO, Mr. Roofing, Inc.



TRY ROOFR FOR FREE TODAY

**Built by roofers,
trusted by roofers.**