



YOUR 5-MINUTE QUICK GUIDE TO

GETTING STARTED WITH ROOFR



Roofr is a management and operations system built by roofers, for roofers.

It's your go-to tech tool for making fast and professional estimates and proposals (plus handling leads, materials, payments, and more), all in one place.

WELCOME TO THE TEAM!

Your company uses Roofr to keep everyone on the team organized, efficient, and in the loop. It links every customer and job detail together in easy, searchable cards. That way, work keeps flowing and nothing gets missed.

The system's super easy to understand and use (in fact, we pride ourselves on it). We'll get you logged on and crushin' it in just a few minutes.

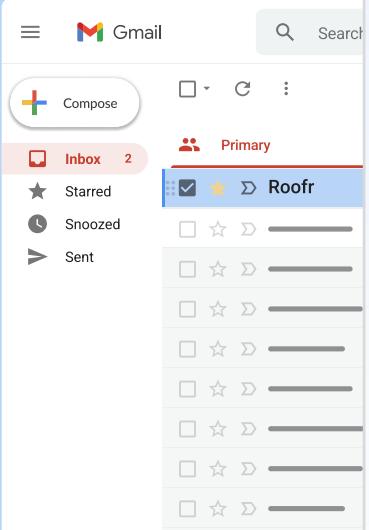
HERE'S HOW→

ACCOUNT SET-UP

STEP 1

Check Your Email

- Look for an email from Roofr with a subject line like:
“You’ve been invited to join [Your Company Name] on Roofr”
- It will come from notifications@roofr.com or another @roofr.com address.
- If you don’t see it, check your Spam, Promotions, or Other folders.



STEP 2

Click the Invite Link

- Open the email and click the “Accept Invitation” or “Join Now” button.
- This will take you to the Roofr website to set up your account.
- You can use your phone, but desktop or tablet works best.



STEP 3

Create Your Account

Now it’s time to:

- Set a password
- Confirm your name
- Accept the terms of service

And you’re in.

Welcome to your shiny new Roofr dashboard.

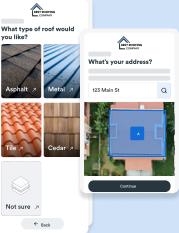
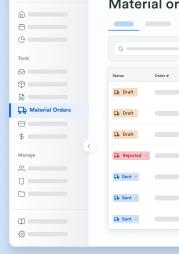
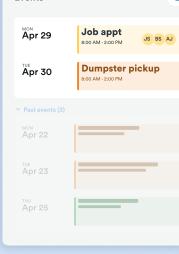
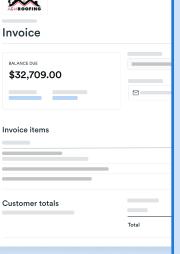
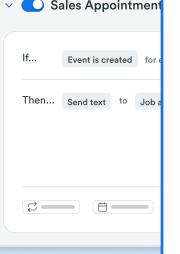
TEST OUT YOUR NEW TOOLS

Depending on what your team uses it for, there's lots to explore in Roofr. But don't worry — we've got resources to help you master everything.

Below, you'll find a quick explainer of Roofr's major features, plus resources (like demo videos, Masterclass lessons, and how-to articles with visuals) to help you get started.



Want a quick lesson to help connect the dots?
[Register for our live CRM overview session.](#)

Instant Estimates	Measurement Reports	Proposals	Material Orders	Calendar & Comms	Payments & Invoices	Automations & more
						

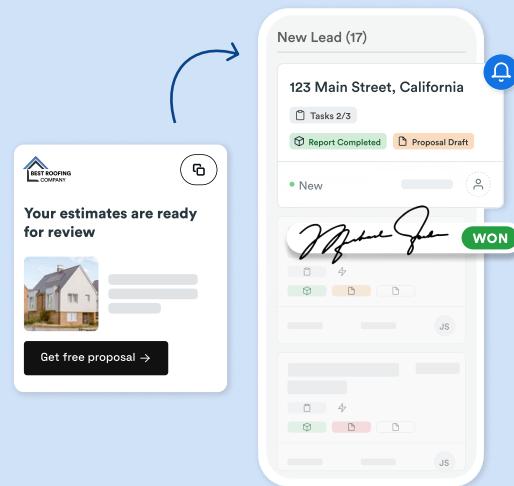
Bring leads in fast with Instant Estimates

The Instant Estimator (IE) is a handy lil' tool you can put on your website (or link homeowners to anywhere, anytime) to let you absolutely master your speed to lead — and crush your competition in the process.

IE RESOURCES

- [Watch the video overview](#)
- [Explore our how-to articles](#)
- [Register for our lead management education session](#)
- [Read our guide to what makes the IE so powerful](#)

+ Want to add a lead manually instead? No prob.
[Watch this Roofr Academy video on creating a new Job Card.](#)

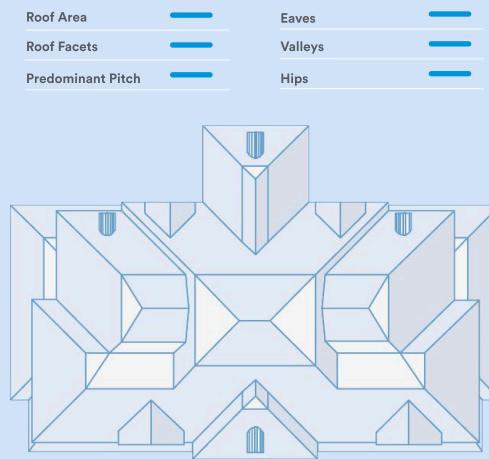


Prep for the job with Measurement Reports

Our Roofr Reports, powered by aerial and drone imagery, are ultra fast and accurate. Just pick the address you need roof measurements for and send off your request in less than a minute. Depending on your plan, they're ready in as few as two hours.

MEASUREMENT RESOURCES

- [Watch the video overview](#)
- [Explore our how-to articles](#)
- [Read our guide to measuring complicated roofs](#)
- [Watch our DIY Roofr Reports Masterclass](#)



Get that “wow” with stunning Proposals

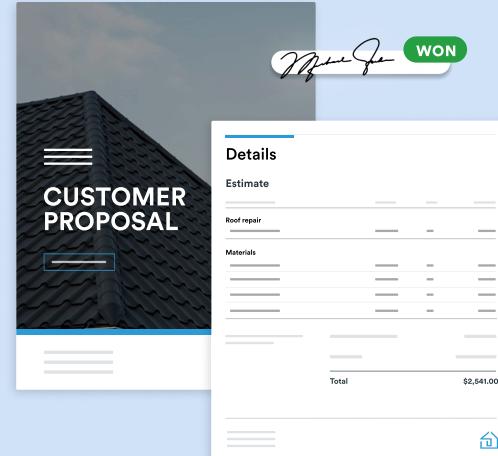
Roofr Proposals look amazing, are a breeze to customize, and help you win more jobs in less time.

Proposals form the foundation for everything else you can do with Roofr, so you'll wanna see what these puppies can do.

PROPOSAL & CATALOG RESOURCES

- [Watch the video overview](#)
- [Explore our how-to articles](#)
- [Take the Roofr Academy course](#)
- [Register for our proposals deep dive session](#)
- [Watch our Masterclass on building your Catalog](#)

👉 Need some help **onboarding and setting up** your Catalog? Our incredible [Implementation team](#) is always here to lend a hand.



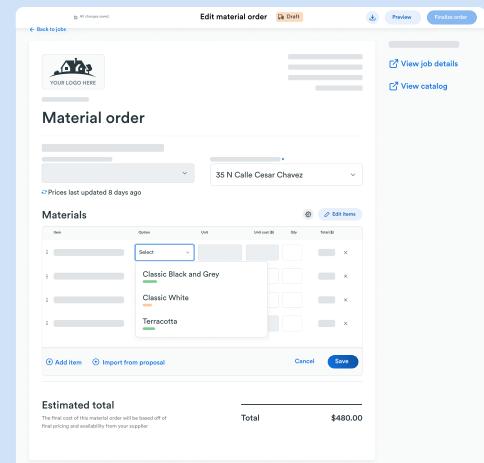
+ **Plus:** use the Catalog to store everything from shingles to starter strips, and you'll never need to re-enter a line item again.

Get your time back with fast Material Orders

Got the signature? Now convert your measurements and proposals into instant ready-to-send material orders. Plus, hook up supplier automations so the latest pricing and inventory syncs in real time.

MATERIAL ORDERING RESOURCES

- [Explore our how-to articles](#)
- [Learn how to hook up Supplier Integrations](#)
- [Link up with your ABC, QXO, or SRS account](#)
- [Read our guide on ordering more efficiently](#)



Stay on the ball with Calendar & Communication tools

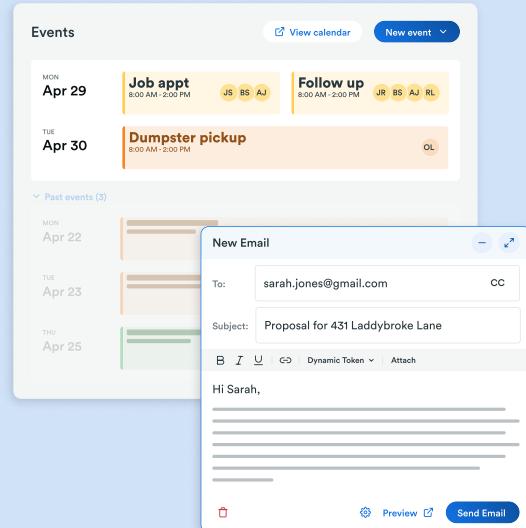
Stop trying to manage appointments, calls, and schedules across 3 different calendar tools.

Sync everything up in Roofr and never miss a meeting again.

CALENDAR & INBOX RESOURCES

- [Watch the video overview](#)
- [Explore our how-to articles](#)
- [Link your Google Calendar to Roofr](#)
- [Link your Gmail to Roofr](#)
- [Learn how to use Roofr Inbox](#)
- [Watch our Masterclass on texting and emailing in Roofr](#)

⚠ Did you know? You can automate reminders, follow-ups, review requests, etc. to send right when you want 'em to.



+ Plus: use Roofr Inbox to manage ALL your emails and texts in one place.

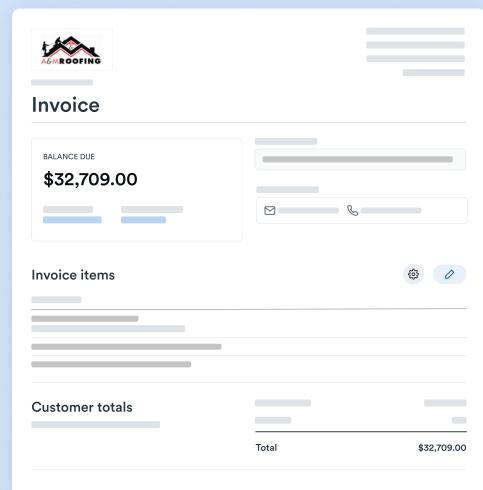
Make it rain with Payments & Invoices

No more duplicate work: turn won proposals into final invoices, just like that.

Plus, bring credit card and ACH/EFT payments right into Roofr so it's easy for happy customers to pay you faster.

PAYMENTS & INVOICING RESOURCES

- [Watch the video overview](#)
- [Explore our invoice how-to articles](#)
- [Read our Roofr Payments setup guide](#)
- [Learn more about Roofr Payments](#)



Step up your game with Automations & more

Roofr's built to do it all, from A to damn Z. So once you've mastered the basics, learn how automations and advanced tools can save you hours and smooth out every part of your day, from follow-ups to final invoices.

AUTOMATION RESOURCES

- [Explore our how-to articles](#)
- [Take the Roofr Academy course](#)
- [Watch our Roofr user automations Masterclass](#)
- [Read our guide to getting started with automations](#)
- [Register for our automations education session](#)

Sales Appointment Text Automation

If... Event is created for event types Sales appointment

Then... Send text to Job assignee

Project start reminder

Hi [Customer Name], E on [event start date]. W

WE'RE HERE TO HELP

You've seen what Roofr can do.

Time to dive in! 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.

Got any questions?

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

Prefer talking to reading?

[Hook up with our implementation team](#). They host weekly education sessions to get you set.





**BUILT BY
ROOFERS,
TRUSTED
BY ROOFERS.**

