



What's new in Roofr

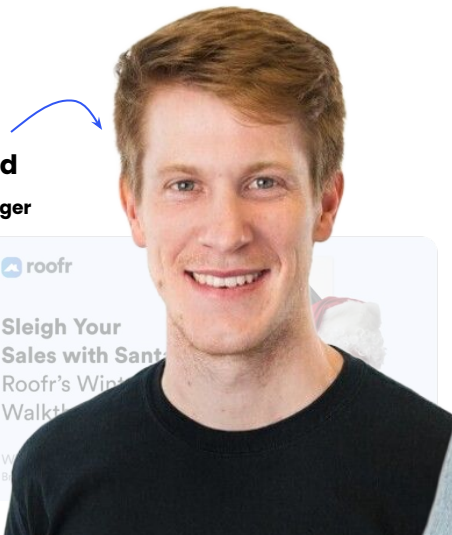
Q2 Product Updates

New features & platform updates to power your roofing business



Your hosts

Nathaniel Ward
Group Product Manager

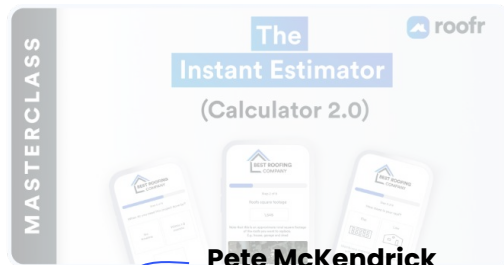


Mackensey Young
Sr. Product Marketing Manager



Pete McKendrick

The man who needs no introduction



Before we get started



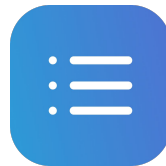
This session is being recorded

We'll send the recording and slides – plus all masterclasses are posted on YouTube.



Live Q&A session at the end

Submit questions as we go in the Q&A tab.
Don't be shy – use the chat!



We'll send follow-up resources

After the session we'll send resources and help docs for everything we cover today.



Jennifer Cleland
Sr. Content Marketing Manager

We want your feedback! Email jennifer@roofr.com. There will also be a **survey** after the Masterclass.

What We'll Cover

1. Q2 Product Recap and key focus
2. QoL updates and feature updates
 - New additions to existing features
 - Platform UI changes
3. Supplier integrations
4. Signatures
5. Homeowner Comms & Inbox **LIVE DEMO**
6. Q&A

Group Education Sessions

These sessions offer a general overview of Roofr tools, covering foundational knowledge and their purpose. Held in a class or seminar format, they cater to a broad audience rather than individual needs.



What we're building

(and more importantly....why)

Q1 Key Focus

Moving more of your work into Roofr.

Time is money

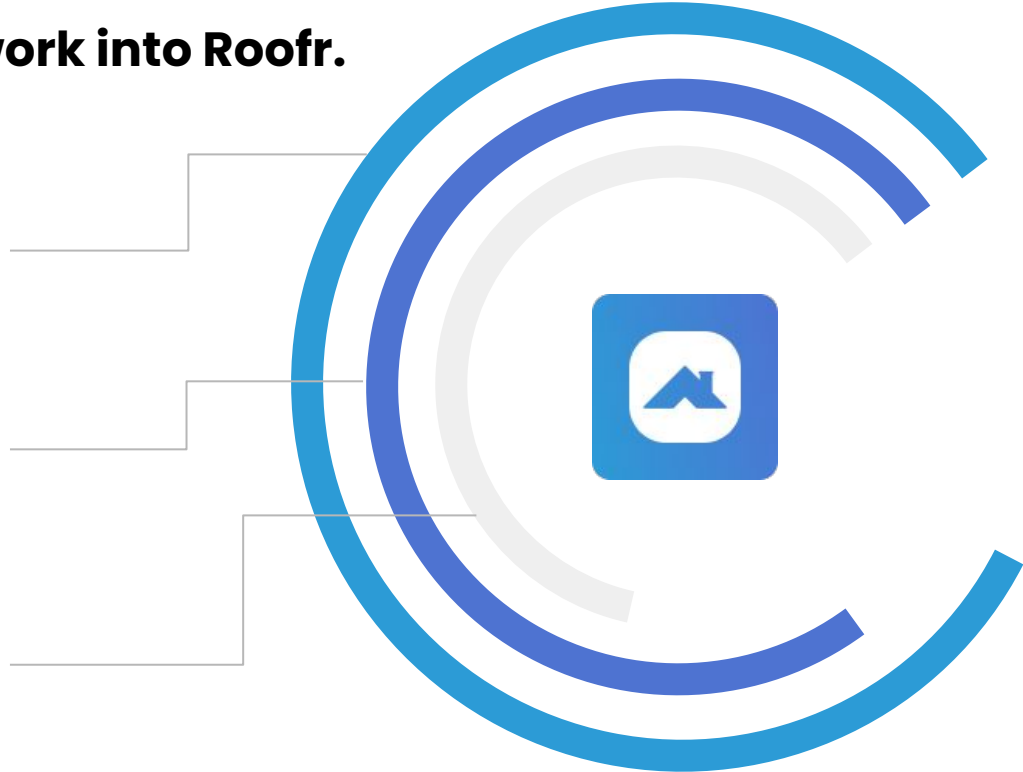
The smallest and easiest tasks still eat up time.

Visibility = Efficiency

Shift your focus from tasks to big picture.

Everyone in one place

No matter the size of the business.



Q2 Updates





Platform Fees


Don't get stuck covering the cost of credit card fees.

What is a "Platform Fee"? A way to incorporate (pass through 🙄) your payment processing fees into your invoice total so you aren't paying to get paid.

Send invoice

Accepted payment types ⓘ

☒ Credit card    

☐ American Express 

☐ ACH

Requested amount

Balance due: \$36,921.68 | Invoice total: \$36,921.68

Dollar amount Percentage

\$ 36,921.68

Your customer will see the following platform fees:

Credit card platform fee: \$1,034.11

Protect your margins

Process ACH & Credit Card payments with Roofr Payments.

Automatically add to invoices

Multi-building reports are neatly grouped under one job.

Keep your company compliant

Updates to reports now create new versions instead of duplicates.

Platform Fees

Platform Fees keep homeowners happy too.

And you know what they say—happy homeowner happy life.

The image shows a smartphone screen with a payment summary and a text message. The payment summary is on the left, and the text message is on the right. The payment summary includes a table with payment details and a total amount. The text message is a green bubble with a white background, containing a greeting, a request to review an invoice, and a link to an example invoice.

Accepted card types:

Cardholder name

Credit card number

Expiry date

CVV

Zip code

Payment summary

Payment amount	\$36,921.68
Platform fee	\$1,034.11
Total amount	\$37,955.79

[Read customer statement](#)

Payment Processing is handled by a Third Party Payments Platform that securely handles all card transactions processed through this Payment Page. The Payment Platform charges a "Platform Fee" to secure and process the transaction to the payment networks and bring this service to you. This is non-refundable.

New Text Message

Today at 1:55 PM

Hello {{Customer name}} !

Please review the invoice below for the project at {{Job address}} .

Feel free to contact us if you have any questions or would like help comparing quotes.

To read a recent article we wrote for the local paper, please click here

[Example Invoice Link](#)

Transparency and trust

Homeowners can see exactly what they're being charged.

Flexible payment options

Homeowners can pay in a way that works for them, and doesn't delay you.

Secure way to pay

Homeowners get peace of mind through secure online transfers.

New Measurements UI

An updated look for the measurements dashboard.

Status	Type	Address	Customer name	Assignee	Actions
In progress	See all reports →	2			See all reports ...
Ready	DIY				View proposal ...
Ready	Roofr				View proposal ...
Ready	DIY				View proposal ...
Ready	DIY				View proposal ...
Ready	DIY				View proposal ...
Ready	DIY				View proposal ...
Ready	DIY				View proposal ...

One Reports Dashboard

Roofr & DIY Reports are consolidated on one page.

Multi-Building Management

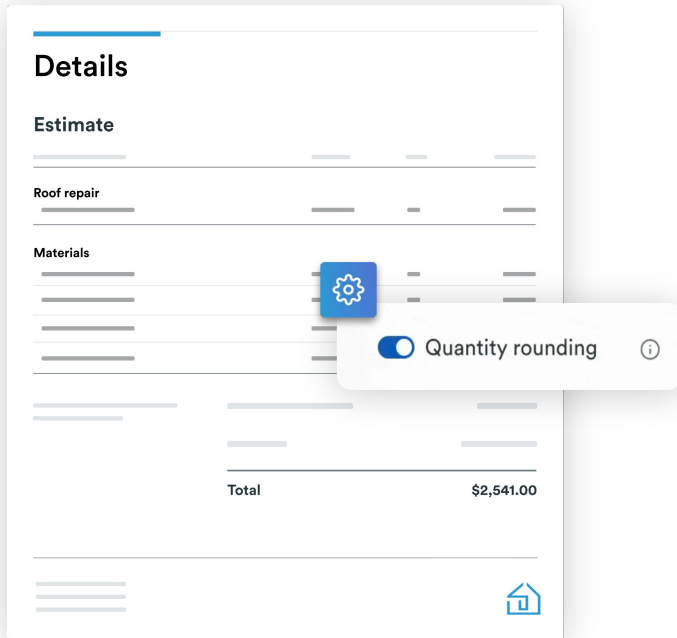
Multi-building reports are neatly grouped under one job.

Report Versions

Updates to reports now create new versions instead of duplicates.

Quick View

The job card now shows squares, pitch, and report totals.

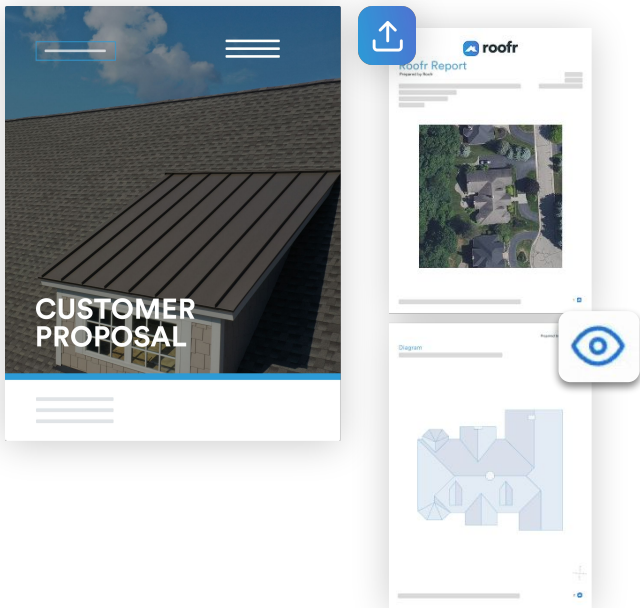


Rounded Material Quantities

Customize your material totals with adjustable quantities.

- Select rounded totals or calculated to the decimal point
- Toggle settings on a proposal-by-proposal basis

- Rounded = enough materials for the job
- Decimal = insurance claims



Measurements in Proposals

Add measurement reports directly into your proposals.

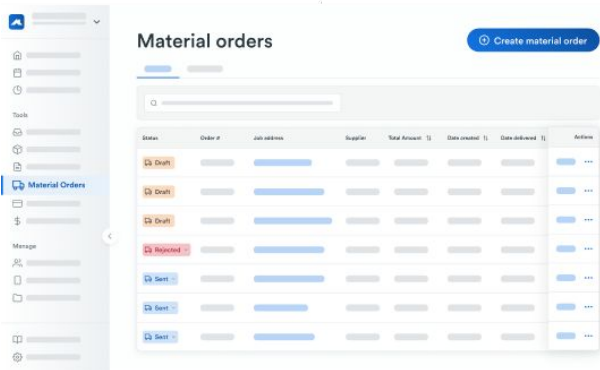
- Add a Measurement Report to a proposal in a click
- Choose which pages to hide or show



Suppliers

Supplier Integrations

Quote confidently with Supplier Integrations



Connect

Connect your branch for specific and accurate pricing



Convert

Instantly convert signed proposals into material orders



Order

Send material orders directly to your branch rep



Signatures

Signatures BETA

Turn PDFs into signable documents

< Back to all documents

Certificate of Completion Example [Send](#) [Edit](#)

Header:

[Your Company Name & Logo]

[Company Address]

[Phone Number]

[Email]

[Website]

Certificate of Completion

This certificate is proudly presented to:

Customer Name:

Property Address:

In recognition of the successful completion of a roofing installation project at the above property.

I, the undersigned, do hereby certify that all contractual obligations have been completed to my/our reasonable satisfaction at:

Insert fillable fields

Choose fillable fields to place on top of your PDF, to be filled out later

Customer Contractor

- ☐ Signature
- ☐ Initials
- ☐ Text
- ☐ Checkbox

Upload any existing PDFs

Multi-building reports are neatly grouped under one job.

Create Templates

Dynamic fields pull in customer and job details for personalization.

Add customer & contractor fields

Use fillable fields to capture what's needed.

Create and send from the job card

Easily send documents for signature at any point in the job.

Certificate of Completion Example 

Use template

Header:

[Your Company Name & Logo]

[Company Address]

[Phone Number]

[Email]

[Website]

Certificate of Co

This certificate is proudly presented to:

Customer Name:

Property Address:

In recognition of the successful completion of a roofing installation project at the above property.

I, the undersigned, do hereby certify that all contractual obligations have been completed to my/our reasonable satisfaction at:

Insert fillable fields

Choose fillable fields to place on top of your PDF, to be filled out later.

Customer

Contractor

Signature

Initials

Text

Checkbox

Dynamic fields

Fillable fields

Configure

Signatures BETA

Watch a demo

Check out a guided tour of Signatures with **Lane Alo, Principal Product Manager.**



Homeowner Communications

INBOX

Centralizing your comms can solve more problems that you think.

Problem

Teams often struggle to keep track of customer conversations.

- Communication lives in too many places — personal phones, emails, inboxes, sticky notes.
- There's no visibility on what's been communicated or not
- Even the smallest teams waste time chasing updates, or cleaning up homeowner confusion.

Job Details

Assignee

RL

Stage

New Lead

Job Value

\$10,450

Source

Instant Estimator - Website

B

Boss

Today at 7:04am

Has anyone followed up with this lead?

B

Boss

Today at 10:16am

....hello?

B

Boss

Today at 2:43pm

....ANYONE??

HOMEOWNER

Sorry...we never heard back.

We went with someone else.

Inbox, Texting & Automations

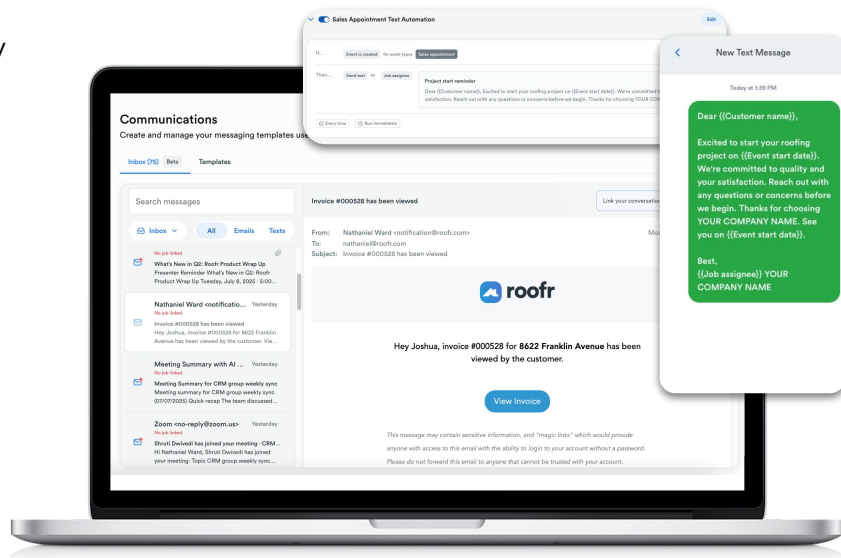
Centralizing your comms can solve more problems that you think.

Solution

A dedicated place for managing job-related messages, that are inherently tied to the rest of your work.

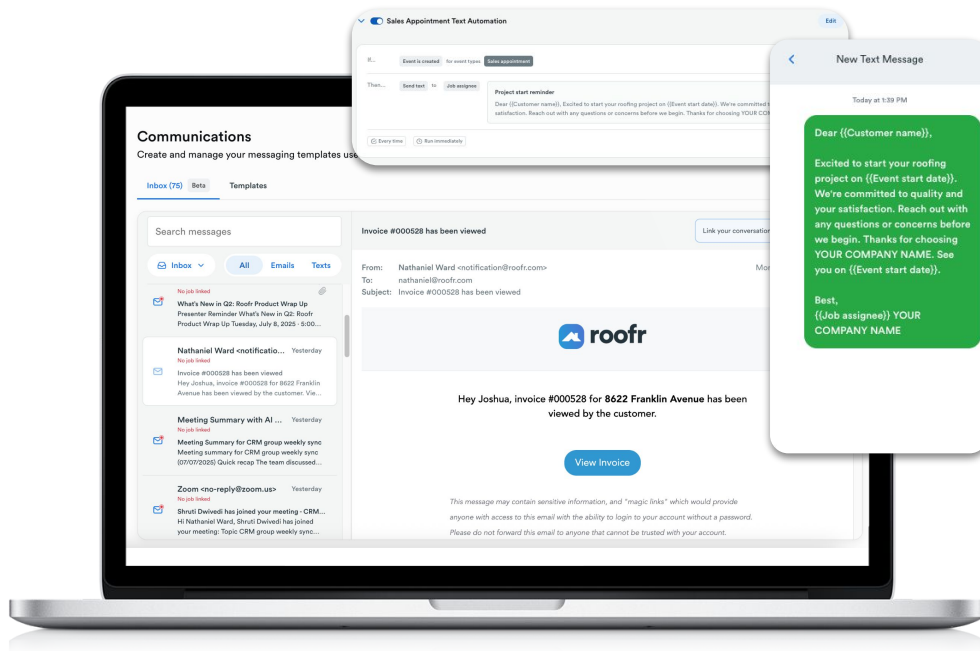
Why it matters: It's more efficient for **everyone**.

- ✓ Owners get visibility across jobs
- ✓ Admins don't waste time forwarding updates
- ✓ Sales & production teams always have the context they need
- ✓ Homeowners stay informed and confident



Inbox, Texting & Automations

Streamlined communication for more efficient work.



Central Inbox

View all customer emails & texts in one place.

Gmail Integration

Sync customer replies directly into Roofr.

Job-Specific Inbox

See only the messages tied to each job.

Automated Messages

Send perfectly timed follow-ups and job updates, automatically.

Templates + Dynamic Fields

Stay consistent while keeping messages personalized.

Texting in Roofr

Following up boosts sales. The proof is in the numbers.

SMS follow-up doubles engagement

Sending a follow-up text can increase engagement rates by 112%.

Persistence wins deals

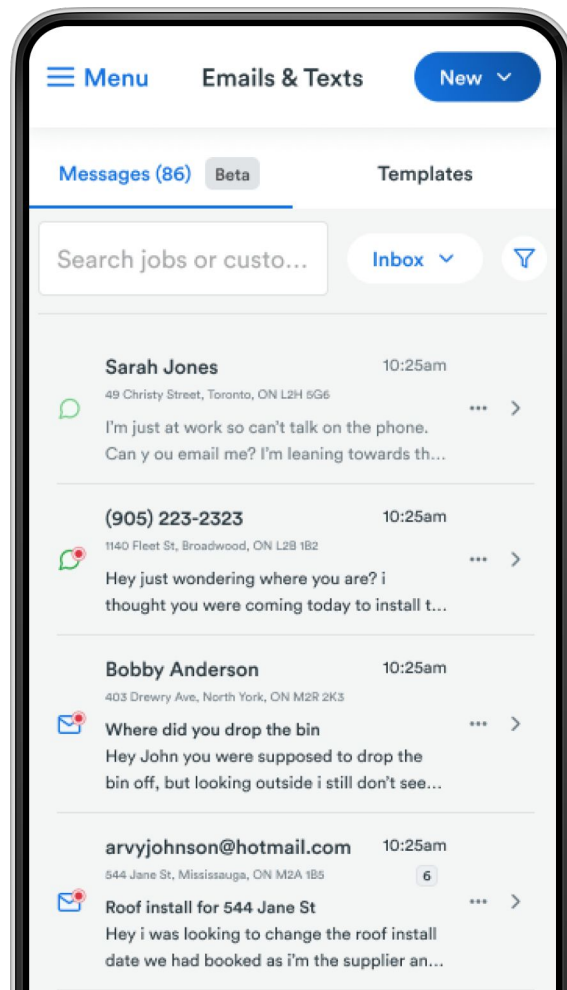
80% of sales require five follow-ups before a deal closes.

Timing matters

48 hour follow-up window after an estimate has been sent.

Subscription add-on

- \$49 / month
- 1000 outbound SMS messages / 1000 inbound SMS messages
- A dedicated local business number
- SMS templates and automation that work directly with customer and job records





LET'S CHAT

CONNECT WITH YOUR ACCOUNT MANAGER.

We're invested in your businesses success. Our Account Management team is a resource for you beyond feature support and troubleshooting.

Your dedicated Account Manager drives long-term success by aligning with your goals, identifying growth opportunities, and maximizing Roofr's platform. Think of them more as a partner in your business who happens to work for Roofr.



Now seems like the perfect time to book a call to review your account, don't you think?

[BOOK A CALL](#)