

# Roofing Business Management

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The solution will help roofing business associates to close more sales faster. Roofing business associates will be able to deliver professional bids to their customers quickly, resulting in a higher percentage of closed sales. Increased sales with the cost controls offered by the solution means increased profit. From the first initial client contact through the sales process on-demand roofing solution will keep associates on track and ahead of the competition. The solution has all the bid building tools necessary to produce the type of bid needed to get their customers to buy!.

## **Features in Details for "Roofing Business Management Solution":**

### **Contact Management:-**

- Track complete customer information: re-roof prospect details, notes and history, appointments, to-do items, documents, and new re-roof opportunities
- Populate pre-defined fields including name, company, phone, address, web site, e-mail, and automatically insert predefined customer numbers for QuickBooks
- Access virtually unlimited date and time stamped notes as well as history of company's re-roof prospects and customers. View a list of notes and see the entire contents of a note
- Attach roofing company representative/salesman to each re-roof prospect. Track each sales decision as the prospect is converted from prospect to customer
- Quickly identify the last communication with a re-roof prospect from the contact tab
- Access pre-defined templates to save time building e-mails and letters. Easily customize the HTML graphical templates to e-mail customers
- Access company-wide account data, including re-roof prospect information, customers, and the role that each contact plays in roofing business relationship
- Provides a web page on your site where customers can submit requests for service

### **Sales Management:-**

- Roofing company sales representative need solutions that make their jobs easier, not more complicated. The solution gives them fast online access to data
- With a simple and intuitive user interface RooferPro is the one SFA (Sales Force Automation) solution every roofing sales rep will love and use
- Roofing company sales managers get access to the activities of their representatives and insight into sales pipelines
- The solution provides powerful opportunity management, forecasting, and reporting, so roofing company owners can be confident their teams are producing at their full capacity
- Roofing company owners get accurate information so they can evaluate their company's past performance while looking ahead to the future.

- Owners can answer critical business questions quickly without sifting through reams of data
- With the powerful analytics, business owners have the real-time information they need to be effective

### **Bid Management:-**

- Add pre-job photos. Take the digital photos and upload them into the bid
- Easily build new bids by selecting three products in a "good, better, best" scenario
- Edit existing bids for customers
- Easily look up older bids for reference later. Many prospects buy up to two years after they receive a bid
- Change individual quantities/prices on each line item for a bid
- Easily select a product color to show the customer on the bid
- Add bid comments to show up on final proposal
- Easily add custom notes geared towards customers
- Print bids in full color
- View bids online through company website

### **Product Management:-**

- Ability to add many different products and different types
- Set custom prices for each aspect of a product (starter, square, etc)
- Ability to add multiple manufacturers for your company
- Add extra services that you offer to clients
- Set custom units/sizes for extra services as well as prices

### **Scheduling:-**

- Schedule calls, meetings, and to-dos quickly and easily
- Use color coding to quickly see type of event on the calendar
- Set up measurement appointments and sales calls
- Filter calendar by employee - Easily view employee availability and instantly drill down into individual calendars
- Employees can quickly see today's and future activities along with important alerts and reminders
- Add personal events - Alert employees about important tasks and calendar changes with e-mail or text messaging
- Set up group meetings quickly. Sends alerts to all participants
- Set reminders and to-dos for both personal and business events
- Access detailed note history for each appointment
- Follow direct link to customer information
- Access maps and driving directions for appointments from the calendar
- Quickly determine time and distance between appointments
- Access different calendar views: month, week, and day for all users
- Access detailed information for each event

### **Marketing Management:-**

Advertising letters and templates bring in qualified leads inexpensively and quickly. A library of customer support letters are ready to use and completely customizable to business

- **Letter Examples....**Pre appointment, Answer any questions, Delay apology, Start – Thank you, Follow up – One week, Follow up – Two week, Follow up – Three week, Follow up – Five week, Finish – Thank you, Referral – Thank you . Each letter can be modified by the roofing business associate to meet the needs of a specific client

**Marketing Website Development:-**

- Choose appropriate template for website
- Job mapping on map
- Customer testimonial management
- Consumer education management
- CMS
- Consumer sign up