

The background of the entire page is a solid orange color. Overlaid on this is a faint, semi-transparent image of a roof with two workers wearing hard hats and safety vests, working on the roof. The image is positioned in the upper right quadrant.

JOBBA

YOUR COMPLETE GUIDE TO ROOFING SOFTWARE'S

FEATURES AND FUNCTIONALITY

YOUR COMPLETE GUIDE TO ROOFING SOFTWARE'S FEATURES AND FUNCTIONALITY

As you start to decide on the project management software that is right for you, it is important to know the main features and functionality of your top picks. Some providers only offer one or two solutions, but complete roofing software options offer a lot more that can help your company grow, succeed and ultimately put more money in your pocket.

We've rounded up some of the main features within roofing CRMs to help you better understand how this piece of technology works for other successful roofing companies.



PROJECT MANAGEMENT TOOLS

After a contract has been signed, it's finally time to get started with the new roofing project. Keeping track of all tasks and milestones is incredibly important to maintaining a reasonable timeline and providing a great finished product to customers.

With your selected roofing CRM, you can keep all of your project information organized and allow for all team members to stay in the know. Everyone can view the project's status as it continues to move through various stages. For example, if a project has gone from needing to be scheduled to the initial production stage, the team working on this project can see everything that is happening, if anything is needed from them and what the next steps are.

Clients

Butera Markets

Butera Elgin Clock Tower

Inspections

New Client Inspection

Inspection Dashboard

Butera Markets

created
Mar 4, 2020
3:29 PM

acknowledged

scheduled
Mar 4, 2020
3:29 PM

initiated

in progress
Mar 4, 2020
3:34 PM

completed
Mar 4, 2020
3:35 PM

approved
Mar 4, 2020
3:35 PM

ready

invoiced

cancelled

↑

↓

Main office
100 South Randall Road
Algonquin IL
(847) 458-9100

Job Info


Section info

Findings

Job costing

Documents

Job Details



Field recommendation

Office recommendation

Cancel

Update

Recommended Action
Guided Checklist

CREW SCHEDULING

Crew scheduling has been proven to be one of the most difficult tasks a roofing company faces. Needing to see all of your field teams availability, being able to coordinate schedules, finding last minute replacements, there's plenty of room for things to get mixed up or missed.

When it comes to getting your labor crew scheduled, your roofing software offers different features and functionality that allows you to view everyone's schedules, including field crews, production managers, subcontractors and more.

These features make scheduling new roofing jobs a breeze.

The screenshot displays a web-based crew scheduling application. At the top, there are tabs for 'Service' and 'Inspection', with 'Inspection' selected. Below this is a filter for 'Crew types: All'. The main interface is a calendar view for the week of 11/16/2020 to 11/20/2020. On the left, a list of 10 items (jobs) is shown, each with a colored dot and address. The calendar grid shows assignments for two crew members: Eugene and James Rizzo. Eugene's assignments are on Thursday 11/19 and Friday 11/20. James Rizzo's assignments are on Wednesday 11/18. Each assignment block includes the time (6:00 am - 10:00 am), the task (e.g., 'Open Deficiencies', 'New client inspection'), the address, and a code (e.g., 'NB-SI', 'EM-NTE').

	Mon 11/16	Tue 11/17	Wed 11/18	Thu 11/19	Fri 11/20
Eugene				<div>6:00 am - 10:00 am - Open Deficiencies 4701 N. Nagle Ave, Hardwood Heights, IL, 60 10683 T&M Service</div> <div>6:00 am - 10:00 am - JP-716 5801 N. Natoma Ave, Chicago, IL, 60631 10684 T&M Service</div> <div>6:00 am - 10:00 am - Hot Roof Test 5801 N. Natoma Ave, Chicago, IL, 60631 10685 T&M Service</div> <div>6:00 am - 10:00 am - Not to exceed 5801 N. Natoma Ave, Chicago, IL, 60631 10687 EM-NTE</div> <div>6:00 am - 10:00 am - New client inspection 5801 N. Natoma Ave, Chicago, IL, 60631 10688 EM-NTE</div>	<div>6:00 am - 10:00 am - New client inspection 1811 Lawrence Ave, Lockport, IL, 60441 10660 NB-SI</div>
James Rizzo			<div>6:00 am - 10:00 am - New Inspections 3200 Brush St, Detroit, MI, 48226 10677 NB-SI</div> <div>6:00 am - 10:00 am - New Inspections 2000 Brush St, Detroit, MI, 48226 10681 NB-SI</div>		

JOB ESTIMATES

When your salespeople go out into the field and are tasked with providing an estimate, it can either lead to a fast signature on the dotted line or, if the estimate is inaccurate or takes an extensive amount of time to draw up, can lead to a job loss to another roofing company.

Certain software solutions for roofers offer tools to auto-populate customer information and job site details (dimensions, deficiencies, desired products, etc.) to your estimates. This eliminates the need to manually enter data and reduces the risk of human error.

John Jocke → Property Proposals → Update Proposal

Proposal ID
20753

Client
John Jocke

Property
John Jocke

Scope
Fix Rusty Gutters

Recommendation
Repair the Rusty gutters

Inspection
Nov 20, 2020 / Red Rhino Roof - Inspection Res and Commercial

Section
Main Section

Recommendation Template

Job type
Contract Service Fixed Price - Per Job

Fixed price amount
\$325.00

Property contact
John Jocke

Proposal type
Service Proposal

Estimated closed date
Jan 8, 2021

Probability of close
33%

Projected work start
Jan 9, 2021

Projected work end
Jan 11, 2021

Estimator
John Jocke

External order number

Client PO

Status
ACTIVE

Quote date
Jan 8, 2021

Valid until
Jan 31, 2021

Closed on

Sales person
John Jocke

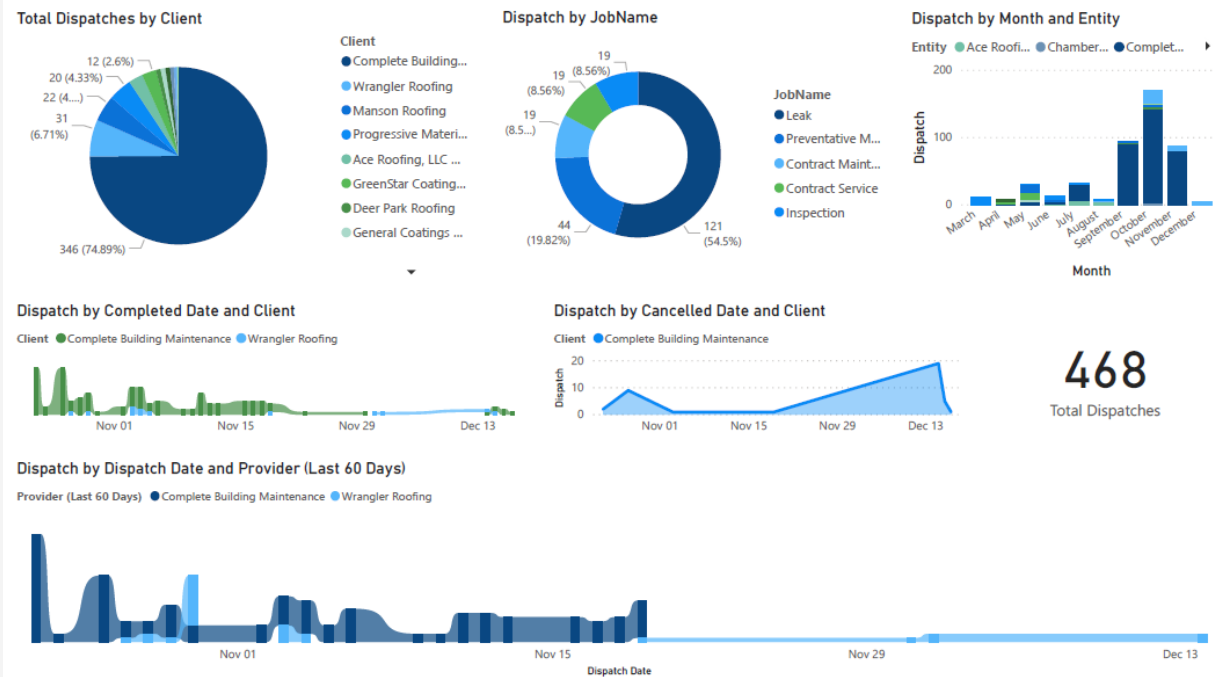
Manufacturer
GAF Materials Corporation

Distributor
EXAMPLE SUPPLY

CUSTOMIZABLE REPORTING

Sometimes roofing businesses have a tough time getting all the data they need regarding their business. That can be anything from individual salespeople's metrics to overall business performance. Many industry leaders have found that customized reporting tools within their roofing CRMs can help them measure operations.

Some roofing applications like Jobba even offer reporting tools to help you track your business's progress and measure performance.



LEAD MANAGEMENT

Lead management is a key factor in running a successful roofing sales department. If new leads get missed or overlooked, it could cost your company a potential job that might have brought in big profits. So how does one ensure you're tackling all your leads in a timely manner?

Your roofing software can notify you of any incoming leads and provide some brief notes on the project. The right software solution also tracks all data and activities to provide a comprehensive view of your sales pipeline. This gives your salespeople more time to spend on searching out new prospects.

Clients → Butera Markets → Butera Elgin Clock Tower

Butera Markets

Balance: \$0.00

Overdue: \$0.00

Main office
100 South Randall Road Algonquin IL
(847) 458-9100

[Info](#) [Contacts](#) [Sales](#) [Inspections](#) [Proposals](#) [Service](#) [Invoices](#) [Vendors](#) [Warranty](#) [Maintenance](#) [Documents](#) [History](#)

Butera Elgin Clock Tower


3 Clock Tower Plaza
Elgin, IL, 60120
Property ID: 1269
Phone: (847) 741-9551


Contacts:
Sales rep: Eugene Zukowski
Contact: Elgin Butera
Contact phone: (708) 555-5555
Contact email: ebutera@fake.com

Warranty
Warranty ID: WC-11
Warranty expiration: Mar 16, 2021
Warranty bill to: [Example Manufacturer](#)

Balance: \$1,000.00

Overdue: \$1,000.00





Add Task

COMMUNICATION HISTORY

Whether you are talking about internal or external communication, it is important to always know who has said what, when it was said and who it was relayed to. Communication problems are something that plague many different businesses in many different industries. But it is especially hard to keep track of for roofers since half of their teams are at numerous sites and not in the office.

Roofing software is designed to help bridge the communication gap that exists between cross-functional teams. It offers tools to help record different forms of communication between team members as well as with customers for the duration of a project. Team members have the ability to refer back to conversations to ensure nothing gets missed.

Clients → 414 Lemont Plaza

414 Lemont Plaza

Balance: \$0.00

Overdue: \$0.00

Main office
13440 S. Archer Ave Lemont IL
(815) 555-5555

PropertiesContactsSalesLibraryLedger

COMMUNICATIONS

PROPERTY	DATE	FROM	TO	MODE	TOPIC	SUBJECT
414 Lemont Plaza	6/11/20 09:10	Jim Rizzo	Eugene Zukowski	Email	Quality	Project Package
414 Lemont Plaza	6/11/20 07:58	David Almario	Jim Rizzo	Email		Project Review
414 Lemont Plaza	6/8/20 00:00	David Plaza	Eugene Zukowski	Phone	Sales	Opportunity for quote
414 Lemont Plaza	6/2/20 00:00	Eugene Zukowski	David Plaza	Phone		Bid review
414 Lemont Plaza	6/1/20 14:15	Jim Rizzo	David Plaza	Phone		Project Review Call
414 Lemont Plaza	6/1/20 00:00	Eugene Zukowski	David Plaza	Phone	Sales	Inspection request
414 Lemont Plaza		Eugene Zukowski	David Plaza	Email		Bid Package Review

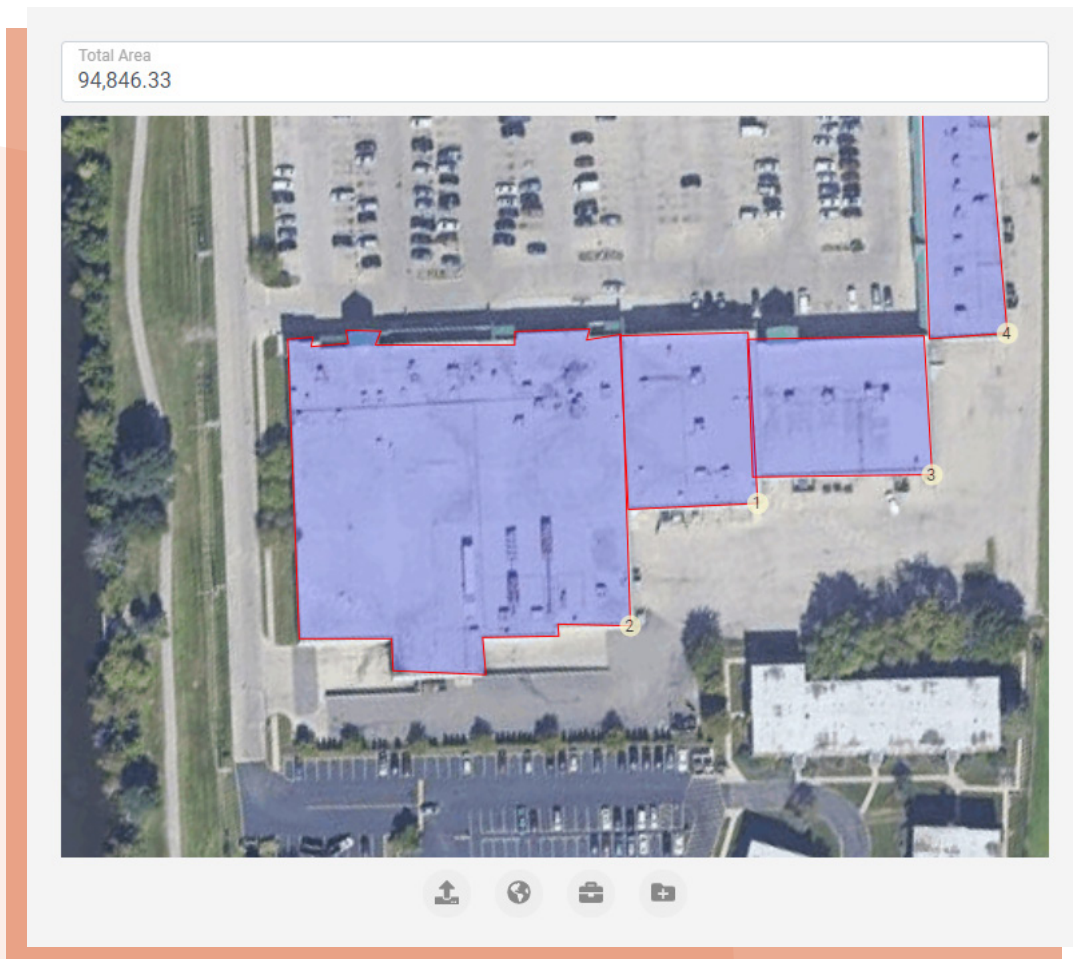
1 - 7 of 7 items


CommunicationsDetailsTasksLabor RatesNotesCustom Fields

PHOTO CAPTURING & EDITING TOOLS

Having pictures associated with every project helps to identify deficiencies, shows the roof's initial state and documents the finished product. It's important that your teams who are in the field have a way to capture these things and share them with the rest of the team (and not lose the image in their camera roll).

Roofing technology provides contractors with tools to help manage photos of work and make notes on any specific areas that might need additional attention. Everyone that is ever on-site (salespeople, estimators, production crews) can upload photos to a roofing job's file and view them at any time—all from their mobile device.





There's no question that there are a lot of different kinds of tools and functionality within CRMs for roofing contractors. The easiest way to decipher what your business needs is to look at your business plan and the goals you have for the company. Those important items will tell you what areas need to be improved and what tools are needed to make that happen. Jobba uses a contractor-driven development approach, meaning that contractors tell us what they need and we build it. Set up a quick, 30-minute demo to find out what kind of tools we can build for you.

Request Your Jobba Demo at jobba.com



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