



Version 3.3

# Sales Rep PRO Kit

\$17,549



**ROOFLE**  
TECHNOLOGIES

# SELL ROOFS IN YOUR SLEEP

It's not a dream, it's  ROOFLE

This patent-pending technology is uniquely designed to harness the growing homeowner demand for a convenient, consumer-driven experience that begins with transparent pricing.

With the ability to offer accurate quotes in seconds for your products and services 24/7, you can wake up to ready-to-buy leads with everything you need to close the deal on-site, at the office, or remotely from anywhere.

This **PRO Kit** will demonstrate just how uniquely powerful this software can be if fully embraced and provide resources to help you get there.





# LAUNCHLIST

Your checklist for success



## Essential Setup



Connect Your Email



Save Your Custom Link



Create QR Codes



## User Guide



Instant Quotes



Dashboard



Rep Quotes



Financing



## Go Next Level



Integrations



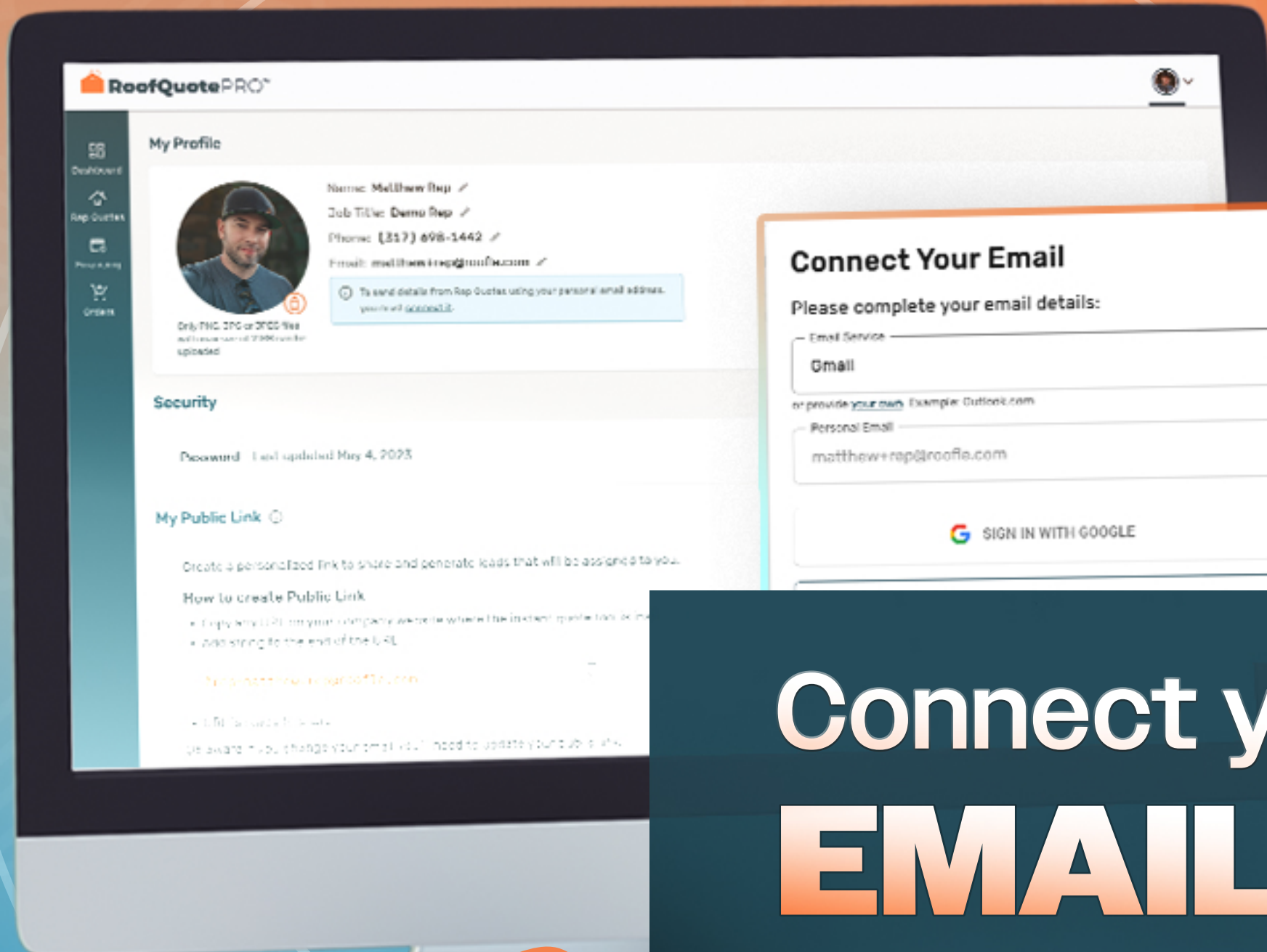
Workflows



Sales Strategies



Marketing Playbook



see how

## Connect your EMAIL ACCOUNT

2 MIN.

Connecting your email account sets your email address as the sender of your quotes. Otherwise, your quotes are sent from your company's connected email address and you will be cc'd.

### Step 1

Login to your portal. At the top right of your screen **click the profile icon** then **go to 'My Profile'**

### Step 2

You'll see a light blue box under your email address. Click **'connect it'**

### Step 3

In the popup, select your email service **Gmail, Yahoo, Outlook, Microsoft** or enter your own. Complete the **authentication process**.

www.yourwebsite/instant-quote?rep=matthew@roofle.com



## Save your **CUSTOM LINK**

**3** MIN.

Your custom public link is extremely valuable! Every lead who gets an instant online quote using your link will automatically be assigned to you

### **Step 1**

Go to your company's website to any page with the instant quote tool installed - we recommend using a dedicated landing page

### **Step 2**

Add the following text to the end of that page's URL:  
**?rep=youremail** ...but replace 'youremail' with your real email address that's used to sign into RoofQuote PRO.

### **Step 3**

Now **copy the entire URL** - this is your custom public link! Paste it somewhere that you can easily find it later, like bookmarking it, add it to your notes, or text/email it to yourself.



see how

## Create your *INSTANT QUOTE* QR CODE

Create a QR Code using your custom public link and use it to generate qualified leads and referrals



Download  
Sticker Template



### Step 1

Go to [qrcode-monkey.com](https://qrcode-monkey.com) to generate QR codes for free. **Paste your custom public quote link** in the 'Your URL' field.

### Step 2

(Optional) Set the colors and design to fit your brand, and set the desired size/quality.  
Click '**Create QR Code**' button

### Step 3

Don't refresh the page until its done generating, then **download your QR code** in png and/or pdf formats

# INSTANT ONLINE QUOTE Lead Flow

How ROOFLE turns LOSING unsatisfied website visitors into *WINNING* trustful qualified leads

STEP 1

## New Lead Enters Their Project Address

Their address is captured and the total SqFt, predominant slope and roof complexity are auto-detected for every roof structure on the property.

To continue, they simply confirm which structures to include and click 'SEE MY PRICE'

STEP 2

## Lead Must Complete 'Almost Done' Form

Before the lead can see their online quote they must complete a simple contact form, giving consent to be contacted about their project.

Remember, if they move forward they expect someone to contact them.

STEP 3

## Lead Sees An Instant Quote For All Products

Within seconds the lead is presented exact or range pricing for up to 8 products or services, showing a total and/or monthly price.

At this point they are ready to talk to a pro, look into financing, or explor more product details.

STEP 4

## Lead Clicks Open Any Specific Product Details

Each product can be opened further into an online shopping-like interface where the lead can research and request more details.

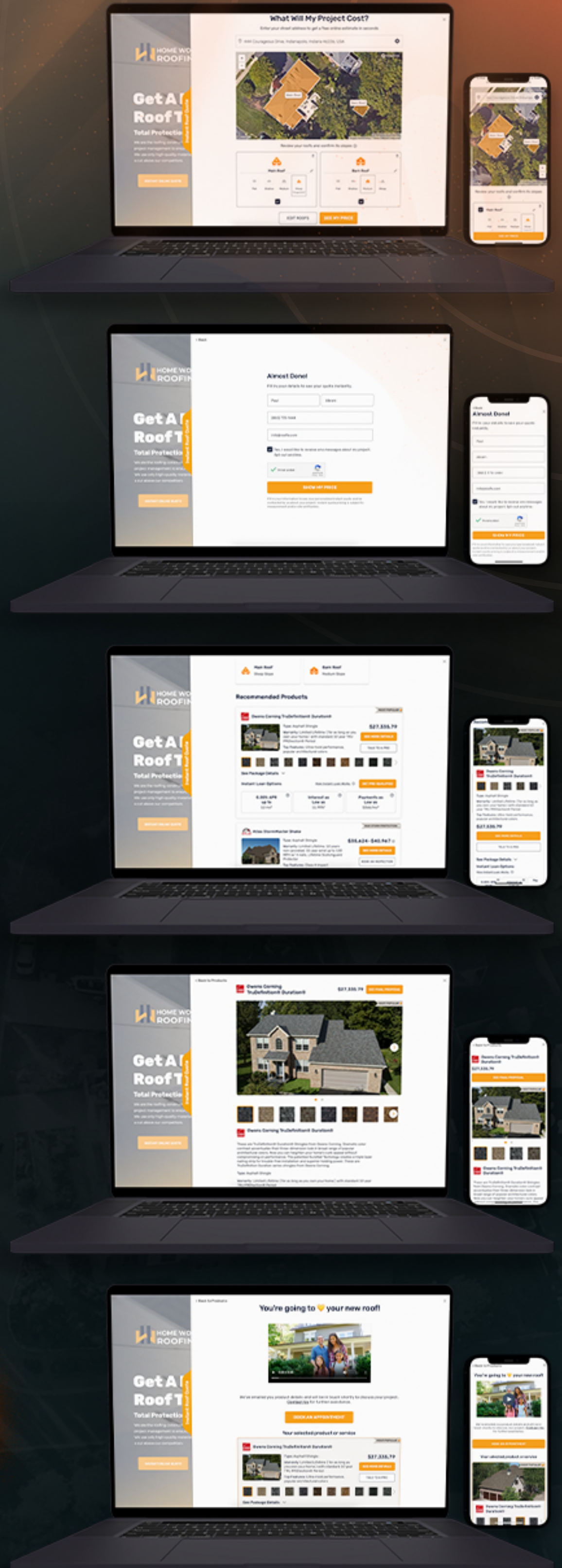
If possible, text or call them while they are still engaged in research on your website.

## Lead Requests Details, Financing, or Proposal

FINISH



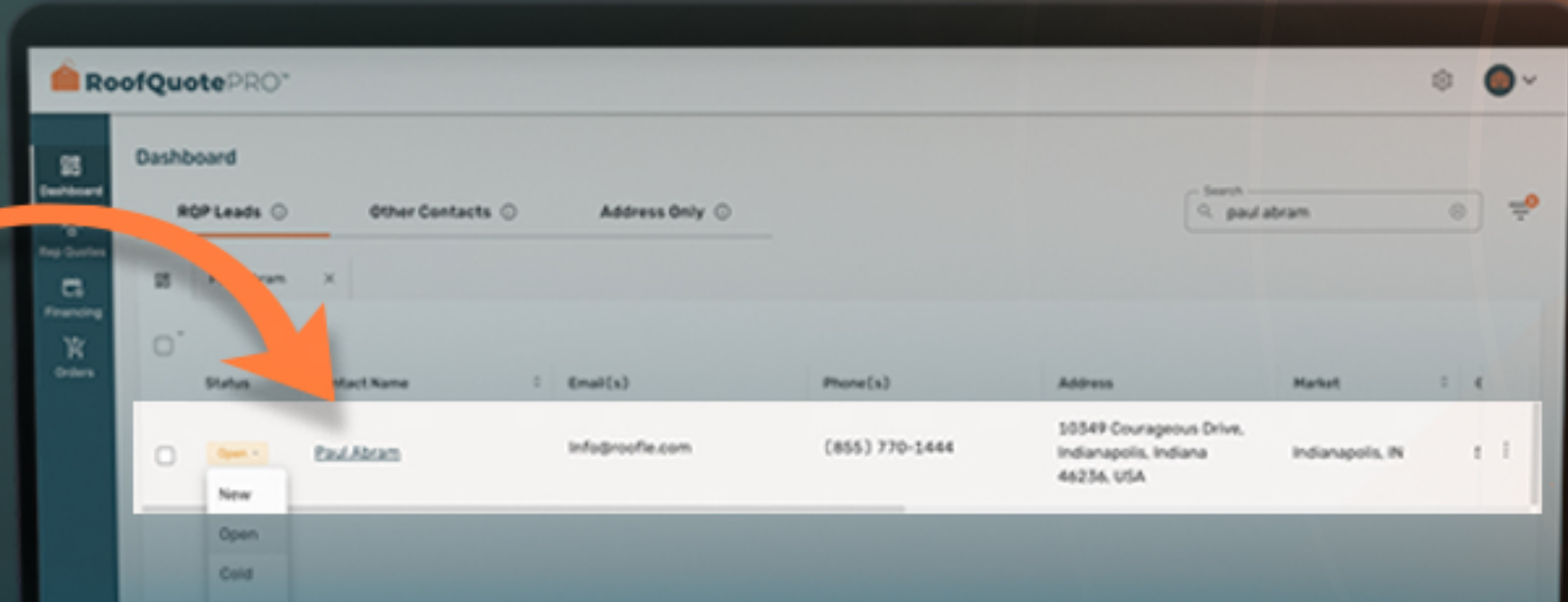
**READY-TO-BUY  
QUALIFIED LEAD**



# YOUR PROJECT Dashboard

Manage all your leads, quotes, measurements, material orders, and notes all in one place.

Click on a contact name to open their project details



Click **ORDER MEASUREMENTS** to get detailed data & imagery reports from EagleView and GAF QuickMeasure



Click **OPEN QUOTE** to modify all quote details



See all the structure details used to power your quotes

Additional Cost and Discounts will display here once added

**Paul Abram** Open

Sep 6, 2024  
Info@roofle.com  
(855) 770-1444  
444 Courageous Drive, Indianapolis, Indiana, 46236, USA  
Indianapolis, IN  
Active Rep - Matthew Admin  
URL: <https://offers.roofle.com/raol/>

**Quotes** **Measurements** **Order** OPEN QUOTE

**Final Total SqFt** 4251  
Original SqFt 3878  
SqFt of Main Roof 3878

**Roof Details 2 of 2**

- ✓ Main Roof - 10/12 Steep Slope  
3878 Final Edited SqFt  
3878 Original Detected SqFt  
895 Perimeter LF  
2 Stories  
Complex
- ✓ Barn Roof - Medium Slope  
373 Final Edited SqFt  
373 Original Detected SqFt  
95 Perimeter LF  
1 Stories  
Simple

**Waste Factor**

**Main Roof**  
Suggested Waste  
• Asphalt Shingle 16%  
• Synthetic 16%

**Barn Roof**  
Default Waste 10%

**Product Details** **Quotes Sent**

#	Product Name	Total Price	Price Range	Instant Quote	Per Sq	Merchant Fee Added	Average Merchant Fee	Interested in Financing	0.00%
1	Owens Corning TruDefinition® Duration®	\$27,975.96	\$25,178 - \$30,773	\$27,975.96	\$530	-	-	-	
2	Atlas StormMaster Shake	\$36,484.27	\$36,484 - \$41,956	\$36,484.27	\$712	-	-	-	
3	DaVinci Roofscapes Single-Width Shake	\$49,731.82	\$49,731 - \$59,678	\$49,731.82	\$940	-	-	-	
4	Standing Seam Metal	\$55,246.66	\$55,246 - \$60,771	\$50,918.58	\$1,100	\$4,328.08	8.50%	-	
5	AtticCat® Pink® Blow-In Insulation	\$4,674.90	\$4,674 - \$5,376	\$4,674.90	\$110	-	-	-	
6	Roof Rejuvenation Spray	\$3,399.93	\$3,399 - \$3,909	\$3,399.93	\$80	-	-	-	
7	Roof Repair Service	\$350	\$315 - \$385	\$350	\$350	-	-	-	
8	Small Solar Array - Each	\$5,000	\$4,500 - \$5,500	\$5,000	\$5,000	-	-	-	

Get **FULL ACCESS** from your Phone or wifi enabled Tablet

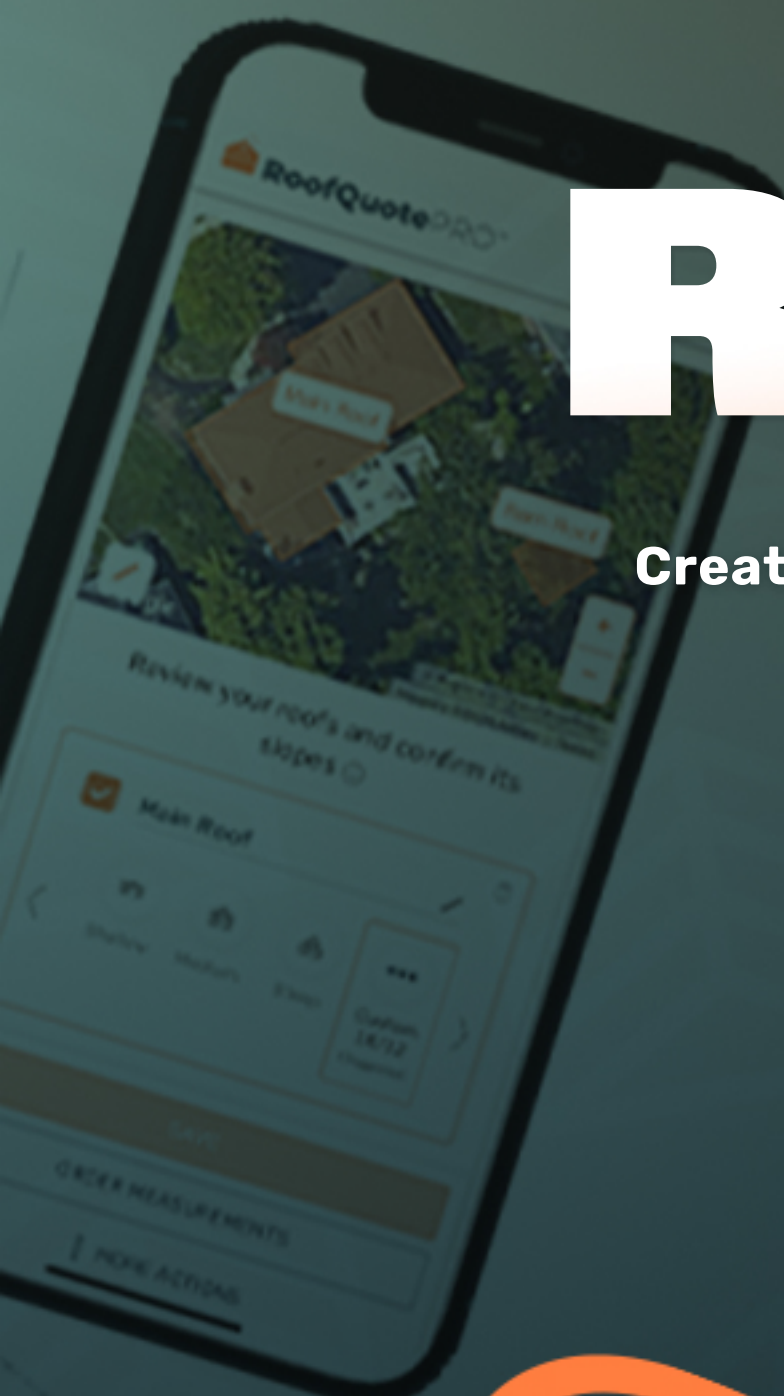


Table shows all products, pricing, and finance info

Click 'Quotes Sent' tab to see a log of sent quotes

# Rep Quotes

Create, edit, finalize, present and share detailed quotes at record speed.



**Rep Quotes**  
Unlimited quotes at record speeds. Add lead to your dashboard

444 Courageous Drive, Indianapolis, Indiana, 46236, USA

**Quote Info**

**Homeowner Details**

**Market**

- Indianapolis, IN

**Total SqFt**

- Instant Quote - 4251 SqFt
- Main Roof - 3878 SqFt
- Barn Roof - 373 SqFt

**Waste Factor**

- Main Roof - Suggested Waste
  - Asphalt Shingle 16%
  - Synthetic 16%
- Barn Roof - Default Waste 10%

**Price Range**

**Additional Cost**

**Main Roof**

- High Roof \$1,938.79
- Chimney Flashing \$125
- Asphalt Shingle Removal \$0
- New Decking \$270
- N/A \$0
- Remove \$6.25

**Barn Roof**

- Asphalt Shingle Removal \$0
- New Decking \$180
- N/A \$0
- N/A \$0

**Total** \$2,520.04

The Additional Cost is already included in the Recommended Products prices calculation.

**Discount**

- \$700 Off Total

**Recommended Products**

**Owens Corning TruDefinition® Duration®** (Most Popular)  
Type: Asphalt Shingle  
Warranty: Limited Lifetime (for as long as you own your home) with standard 10 year TRU PROtection® Period  
Top Features: Ultra-hold performance, popular architectural colors  
\$24,776.96

**Atlas StormMaster Shake** (Max Storm Protection)  
Type: Asphalt Shingle  
Warranty: Limited Lifetime, 10 years non-prorated, 15 year wind up to 130 MPH w/ 4  
\$33,285.27

START OVER ASSON ORDER MEASUREMENTS SAVE

Send quotes for the products and details you select with **CUSTOMIZED EMAILS**

**Edit Email**

You can change the content of the sent email

Attach PDF of Quote

Show Square Footage

Send from: Demo Account

Send to: info@roofle.com

CC: Email

Comment: Your Customized Roofing Proposal From BadAss Roofng

SEND CANCEL

**Invitation Sent!**

We've sent an invitation to apply to your mobile phone, it only takes a few minutes to get pre-qualified, and this will not affect your credit score. Once pre-qualified, you can choose a loan that fits your needs. Apply for the loan and get qualified within minutes!

If you want to get more info about loan click [How Instant Loan Works](#).

If you'd like to use a different phone number or email, please enter it here:

Phone: (855) 770-5444

or

Email: info@roofle.com

RESEND INVITATION

**Total SqFt**

**QuickMeasure**  
GAF QuickMeasure - 4283 SqFt

- Structure 1 - 3892 SqFt
- Structure 2 - 391 SqFt

**Waste Factor**

- Structure 1 - Suggested Waste 18%
- Structure 2 - Suggested Waste 9%

**Total SqFt**

**EagleView**  
EagleView Premium Residential Report - 4298 SqFt

- Structure 1 - 3890 SqFt
- Structure 2 - 400 SqFt

**Waste Factor**

- Structure 1 - Suggested Waste 20%
- Structure 2 - Suggested Waste 8%

Use verified per structure **Total SqFt** and **Waste Factor** from your **EAGLEVIEW** and **GAF QUICKMEASURE** reports

**Additional Cost**

Please answer the questions about the Main Roof

How many stories above ground is the roof?  
 1 Story  
 2 Stories  
 3+ Stories

How many layers will need to be removed?  
 Not Applicable  
 1 Layer  
 2 Layers  
 3+ Layers

How many chimneys need new flashing?  
 None  
 1 Chimney  
 2 Chimneys

Additional Cost: \$2,520.04

<b>Main Roof</b>	
High Roof	\$1,938.79
Chimney Flashing	\$125
Asphalt Shingle Removal	\$0
New Decking	\$270
N/A	\$0
Remove	\$6.25
<b>Barn Roof</b>	
Asphalt Shingle Removal	\$0
New Decking	\$180
N/A	\$0
N/A	\$0

SAVE

Include **ADDITIONAL COST** upgrades or items that weren't included in the instant quote, and finalize with **DISCOUNTS**

Send **FINANCING PRE-QUALIFICATION** invitations by text or email for **rapid funding**

Order detailed **MEASUREMNT REPORTS**

# DELIVER FINANCING RIGHT FROM YOUR WEBSITE



**AI-POWERED INSTANT DECISIONING**

# WITH OVER 30 LOAN OPTIONS

**HYPE VIDEO**



# INTEGRATIONS



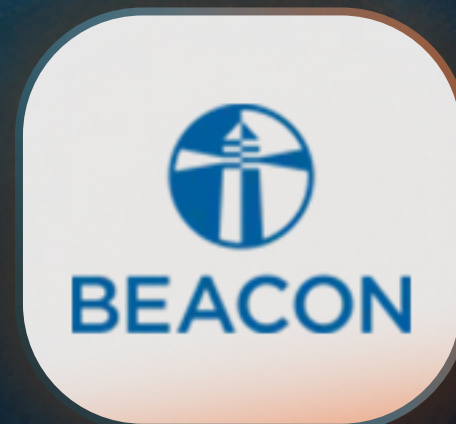
## A REVOLUTION IS BREWING



INSTANT ROOF QUOTE



Detailed Measurements & High-Res Imagery



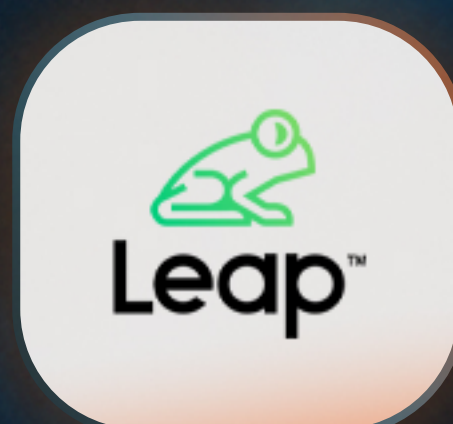
Material Ordering



Sponsored  
Subscription



Customer Relationship Management



Sales Enablement Tools



# WORKFLOWS\$

Our suggested play-by-play actions for common workflows from lead to material order

## Retail

**Instant Quote      Initial Contact      Measurement      Inspection      Proposal      Material Order**

### WEBSITE LEAD

Lead completes Instant Online Quote LeadFlow Step 3 or higher      Automated email sent w/ quote for all and specific products requested, call ASAP!      Auto-order EagleView or QuickMeasure if lead requests proposal or order after initial contact      Determine if on-site inspection is needed using storm data and high-res imagery      Build & share proposal using integrations or send finalized quotes using Rep Quotes      Convert detailed into full material take-offs, order and track in your Portal

### ADDRESS ONLY

Send mailers to the neighborhood w/ Deep Linking QR code      Search CRM for any past communication, Keep sending mailers, geofence digital ads      Use instant quote structure data until contact has engaged and wants a proposal      Offer visualization over inspection, like a free visualizer and w/ the online quote      Don't send proposal until after contact has engaged and requested one      Use the Beacon Pro+ integration, same process as a website lead if converted,

### IMPORTED LEAD

Open lead in Rep Quotes to create and share quote or text Deep Link      Continue existing talks if relevant, add contact to longer term email sequence      Use instant quote structure data until they are ready for a final proposal      Determine if on-site inspection is needed or preferred by the property owner      Build & share proposal when if and when it's appropriate to do so, set it expire quickly      Use the Beacon Pro+ integration or continue production in connected CRM

### DOOR-TO-DOOR

Pitch quote and pre-qual finance offers in 60 secs (no credit impact)      One-stop close or set appt for consult, then email appt details w/ instant quote      Order EagleView or QuickMeasure prior to inspection or after contact's pre-qualified      Do a ground level inspection, reference imagery, email quote w/ recommendations      Present a finalized quote with additional costs and discounts before a full proposal      Keep notes in dashboard and draft a material order to see the cost forecast

### HOME SHOWS

Present live quotes using Rep Quotes on large screen, and share QR swag      Use an offer to give swag to incentivise booking an on-site or virtual follow-up      Order EagleView or QuickMeasure at show while presenting to serious prospects      Gather details from prospect to determine if further inspection is needed or preferred      Show examples of proposals while presenting a finalized Rep quote at show      Demonstrate online material tracking to showcase a smooth production process

## Insurance

**Instant Quote      Initial Contact      Measurement      Inspection      Proposal      Material Order**

### WEBSITE LEAD

Lead completes Instant Online Quote LeadFlow Step 3 or higher      Automated email sent w/ quote, call ASAP to book same day inspection      Auto-order EagleView or QuickMeasure if lead requests proposal or order after initial contact      Use custom buttons to offer booking an inspection online after instant quote      Lead completes Instant Online Quote LeadFlow - Step 3 or beyond      Use draft orders to understand material costs and forecast profit margins

### ADDRESS ONLY

Knock doors and reach out to past clients in the area, leave doorhangers      If you show up, don't say how you got their info and be sure to knock nearby doors      Use instant quote structure data until they engage and request a proposal      Drop a personalized note offering free storm damage report and online pricing      Knock doors and reach out to past clients in the area, leave doorhangers      Use the Beacon Pro+ integration, same process as a website lead if converted,

### IMPORTED LEAD

Open Lead in Rep Quotes to share a 'Good Faith' quote or text Deep Link      Continue existing talks if relevant or email sequence sharing expertise      Use instant quote structure data until they are ready for a damage inspection      Offer a free storm damage report and online pricing to validate their claim      Open Lead in Rep Quotes to share a 'Good Faith' quote or text Deep Link      Use the Beacon Pro+ integration or continue production in connected CRM

### DOOR-TO-DOOR

Present from Rep Quotes, offer 'Good Faith' estimate w/ range pricing      Determine scope of damage and share recommendations w/ instant quote      Order EagleView or QuickMeasure prior to inspection or after contact's pre-qualified      Conduct documented inspection or set for same day, email details w/ instant quote      Present from Rep Quotes, offer 'Good Faith' estimate w/ range pricing      Draft material order for quick cost forecasting and selections availability

### HOME SHOWS

Run a giveaway, send confirmation w/ Deep Link, give free QR swag      Answer insurance questions, offer same-as-cash loans to speed up project      Order EagleView or QuickMeasure at show while presenting to prospects with appts      Book inspection for after show or order drone/damage report and present remotely      Run a giveaway, send confirmation w/ Deep Link, give free QR swag      Demonstrate online material tracking to showcase a smooth production process

## How to raise your Closing Rate!

The #1 advantage of providing a quote *before* meeting with a prospect, whether for an on-site inspection or virtual consult is it **removes the price objection**.

By taking the next step after seeing an instant quote, the prospect's acknowledging that the expected cost is within their budget.

Use these **key strategies** to offer an upfront quote in service of the customer.

### Appeal to Majority

*"Most people prefer knowing costs upfront before committing time and effort to a meeting..."*

### Be in Demand

*"My schedule is tight, so I've sent an online quote along with a link to explore pre-qualifying financing options."*

### Offer Personalization

*"I've sent a soft quote with different options. Let me know which level best fits your needs..."*

### Be Transparent

*"Here's a detailed, upfront quote so you know exactly what to expect. Let's review it before we meet..."*

### Offer Time-Savings

*"I've sent a preliminary quote so you can review costs ahead of time, and we can focus on specifics during our meeting..."*

### Build Trust with Data

*"This quote is based on high resolution imagery and real-time data, ensuring it's both accurate and fair..."*

### Create Urgency

*"Here's your quote—prices can fluctuate, so it's best to lock this in before they change..."*

### Start the Convo

*"Here's a ballpark quote to give you a starting point. We can fine-tune the details once we talk further..."*

### Sell Your Process

*"This quote reflects our commitment to providing efficient, high-quality, and transparent service..."*

# NO MORE TIRE KICKERS



# SECRET SAUCE Marketing Playbook

From beginner to guru, adopt these marketing strategies to blow your leads through the roof



LEVEL 1

## Add Rep Link To Email and QR To Your Biz Cards

Link your personal instant quote tool in your work email signature and other online profiles or employee pages.

Get new business cards with your QR code and a call-to-action 'Scan for a Free Instant Online Quote'

LEVEL 2

## Print QR Code Stickers and Stick In Sweet Spots

Print a bunch of custom stickers with your Rep Link QR Code and stick them everywhere!

Like on brochures, door hangers, and other print materials. Post them with your business card at coffee shops and other community spaces.

LEVEL 3

## Engage and Share Rep Link On Local Nextdoor

Check all the local neighborhoods on Nextdoor you're connected to for anyone seeking pro advice about home improvements.

Provide genuinely helpful information to build clout and share your Rep Link to your feed.

LEVEL 4

## Build A Referral Network of Realtors, Clients, Partners

Add "&referral=name" to your Rep link (replace name with your referrer's name) to create a custom link for each referral.

Track their leads from the conversion URL and reward them with affiliate gift cards or payouts.

GURU

## Create A Personal Brand on Social Media

