**UP – Tasks For Closing Out A Completed Job**

Complete these tasks after sending the payment receipt for the invoice or when otherwise tasked to do so:

1. **Send all Warranties applicable** (check the job notes first to know which to send or ask a manager)

**Be sure to e-sign the company rep's name at the bottom and insert the correct Manufacturer's year.**

(If the manufacturer year or any other information is wrong, the Ins. Co. will need a wet signature after correction using that same form. Therefore, if this happens, just create a new form with any necessary corrections and resend. That will save a big headache)!

* I call or text the customer to ensure they received their warranty email and remind them of their Discount Form. This helps build rapport and gives a better feel as to whether we should send the review docs. Sometimes we can make mistakes for only God knows why, lol.

1. UpFront 5-YEAR ROOF CERTIFICATION
2. Roof Warranty Certificate

(sent by email after registering the shingles)

1. Email Verification of Registration

(print to pdf the email of proof, add to the job, and send to the customer)

1. Insurance Discount Roof Form

(State Farm, Allstate, and USAA have their own forms, all other companies use the generic form located in company documents)

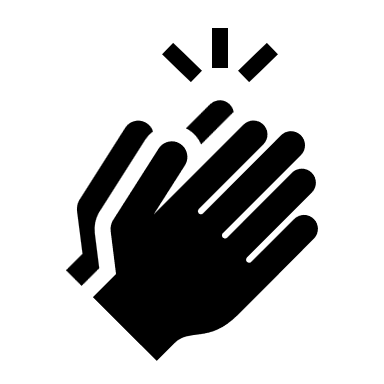
1. Home Transfer Link to Atlas or Malarkey
2. **Send the Roof Discount Form** **to the customer’s insurance company,** if possible, otherwise the customer can deal with it. This is done only **as a benefit** to using our company. Help the customer understand this fact.
3. **Inform the customer we will contact them in one year** for a complimentary follow-up inspection to ensure all is well. This can be done either by email or by phone. I prefer to include it in the Warranty Email.
4. **Insert all one-year reminders into the 1st of the calendar month** for that complimentary inspection.

Example: June 1, 2025, or, September 1, 2026, etc. This way we can then schedule as desired.

Add as many names on the 1st day as needed.



1. **Review the latest messages for any missing information** you may find from anyone. We can all make mistakes and double-checking before closing out a job helps correct this issue. It has happened. Teamwork!
2. **Lastly, send BBB & Google Review Instructions email:** Send the email template and attach the Review Instruction pages all located in the company docs
3. **Add any information you may find, at any time, to the job** for later reference. Better now than later!



Now close the job and move on to the next one. Good Job!

**See the email examples below** for sending warranties (adjust email body or documents as needed)

**Atlas Shingles**

Hello Name,

Please see the attached documents.

Also, if you decide to sell your home, I included the Atlas home transfer link (found on the Atlas website under the System & Warranty tab).

**FYI**... Click the link and apply the code from the Certificate to the transfer page; see the sample page included.

<https://www.atlasroofing.com/warranty-transfer>

1. UpFront 5-YEAR ROOF CERTIFICATION
2. Atlas Roof Warranty Certificate
3. Atlas Email Verification of Registration
4. Atlas sample Instructions page: How to transfer home roof to new owner
5. Atlas Link to transfer: <https://www.atlasroofing.com/warranty-transfer>

Thanks, and have a great week,

Your Name

UpFront Team

719) 799-3526

**Malarkey Shingles**

Hello NAME,

Please see the attached documents.

As a benefit of using our company, we register your roof shingles for you.

We will also send your insurance company a copy of it with the roof discount form. 🌞

You might call them in a few days to ensure they received it and your discount is set. 💵🏠

You may keep this email thread for future reference.

We will contact you again around year one, after the installation date, to schedule a One-time Complimentary Roof Inspection to ensure everything is in good shape! 😁

FYI... if you decide to sell your home, the Malarkey Home Roof Transfer link to their website is included. This email contains:

     1. UpFront 5-YEAR ROOF CERTIFICATION  
     2. Malarkey Roof Warranty Certificate  
     3. Malarkey Email Verification of Registration   
     4. Insurance Roof Class Certification Form   
     5. Malarkey Link to transfer:

<https://www.malarkeyroofing.com/warranties/shingle-warranty-transfer-application/>

Thank you again for choosing us for your project.🏡

YOUR NAME

UpFront Team

719) 799-3526

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