
XACTCONTENTS TRAINING ONLINE COURSE OUTLINE

■ COURSE OVERVIEW:

- TRAINER INTRODUCTION
- SUMMARY OF COURSE AND OBJECTIVES
- WEB SESSION RULES AND EXPECTATIONS
- SCHEDULE AND TIMELINE
- CREATE XACTANALYSIS SP DESKTOP SHORTCUT\ADD TO FAVORITES

CONTENT ESTIMATE DEMONSTRATION AND OVERVIEW

■ QUICK ENTRY METHOD

TRAINER FEATURE DEMONSTRATION

■ CONTROL CENTER:

- REAL-TIME TRAINING
- DASHBOARD
 - 1) OPEN PROJECT
 - a) CREATE A PROJECT
 - b) OPEN A RECENT PROJECT
 - 2) XACTNET COMMUNICATIONS
 - a) REGISTERING – XACTNET ADDRESS
 - b) ASSIGNMENT CYCLE
 - c) DOWNLOADING DATA
 - d) UPLOADING DATA
 - e) DATA TRANSFER
- USER PREFERENCES
- DOCUMENT MODULES
- PROJECTS

■ CLAIM INFO:

- INSURED INFO
- COVERAGE/LOSS
 - 1) LOSS INFORMATION
 - 2) COVERAGE
 - 3) ADDING COVERAGE TYPES
 - 4) REMOVING COVERAGE TYPES
 - 5) SUBLIMITS
- PARAMETERS
 - 1) SELECTING A PRICELIST
 - 2) TAX JURISDICTION
 - 3) SALVAGE RETENTION/PERMIT
 - 4) DEPRECIATION OPTIONS
 - 5) SALES TAX BUTTON
 - 6) SELECTING/CREATING A COMPANY HEADER
 - 7) SELECTING/CREATING A MODEL OPENING STATEMENT

■ XACTCONTENTS:

- CONTENTS GROUPING TREE
- PRICING DATA
 - 1) XACTCONTENTS DATABASE
 - 2) WEB SEARCH
 - 3) PRICE LIST (GENERAL QUOTE ITEMS)
- QUICK ENTRY
- CONTENTS SEARCHING METHODS
 - 1) KEYWORD
 - a) MODEL # SEARCH
 - b) F2 SEARCH
 - 2) REFERENCE SEARCH
 - 3) DRILL DOWN
 - 4) SEARCH BY FEATURE
- SELECTING ITEMS
 - 1) VENDOR ITEMS
 - a) ITEMS FOUND IN XACTCONTENTS DATABASE
 - b) ITEMS FOUND IN WEB-SEARCH
 - 2) DISCONTINUED ITEMS
 - 3) GENERAL QUOTE ITEMS
 - 4) LIKE KIND AND QUALITY ITEMS
 - 5) VIEW OR COMPARE FEATURES
 - 6) MISC. ITEMS
 - a) ADDING ITEM NOTES
 - 7) PURCHASE ITEMS
- CONTENT MACROS
- IMPORT CONTENTS WORKSHEET

■ DIGITAL IMAGES:

- LOAD IMAGES
- ANNOTATION

■ PRINTING:

- ESTIMATE REPORTS
 - 1) CONTENTS REPORT
 - 2) COVERAGE LIMITS
 - 3) ABSORBING THE DEDUCTABLE
- PRINT OPTIONS
 - 1) PRINT SELECTION
 - 2) CATEGORIES
 - 3) COVERAGES
- EMAIL OPTIONS

■ MARKING A PROJECT COMPLETE:

- MAKING ADVANCED PAYMENTS
- SUPPLEMENTS AND CORRECTION

■ PAYMENT TRACKER:

- SUBMITTING PAYMENT
- RECONCILING THE DEFERRED PAYMENT
 - 1) ENTER ACTUAL REPLACEMENT COST
 - a) OVER REPLACEMENT COST
 - b) UNDER REPLACEMENT COST
 - 2) PAY RC BENEFITS
 - 3) OVERRIDE DEFERRED AMOUNT
 - 4) PARTIAL REPLACEMENT
 - 5) GROUP PAYMENT
- POLICY LIMITS AND SUBLIMITS
- PAYMENT SUMMARY
- PAYMENT WORKSHEET
- HISTORY

■ DATA TRANSFER:

- TRANSFER OPTIONS
- BACKING UP DATA

■ CONCLUSION

- RECAP MATERIAL COVERED AS IT RELATES TO COURSE OBJECTIVES
- REINFORCEMENT TRAINING OPTIONS
- QUESTION AND ANSWER SESSION
- STUDENT FEEDBACK SURVEY