

Fundamentals Training

Chapter 1: The 4-Step Estimating Process

- What You Need to Know about XactAnalysis
- Downloading XactAnalysis Assignments
- Adding a New Project
- Estimating with the 4-Step Process
- Chapter 1 Certification Prep Questions
- Practice Exercises

Chapter 2: Entering Claim Information

- Understanding Claim Information Parameters
- Chapter 2 Certification Prep Questions

Chapter 3: Introduction to Sketch

- General Orientation
- Viewing Tools
- Chapter 3 Certification Prep Questions

Chapter 4: Small Interior in Sketch

- Setting Up Sketch Views
- Dimensioning Rooms
- Accessing Room Properties
- Changing Room Shapes: The Square Break Tool
- Adding Rooms: Ctrl+Click+Drag
- The Square Break Tool & Ctrl
- Creating Subgroups
- Building Staircases
- Adding Wall Openings
- Basic Room Variables
- Chapter 4 Certification Prep Questions

Chapter 5: Writing the Scope of an Estimate

- Understanding Estimate Item Features
- Quick Entry in Detail
- Searching for Line Items
- Chapter 5 Certification Prep Questions

Chapter 6: Completing and Printing an Estimate

- Finalizing Estimates
- Printing the Estimate
- Chapter 6 Certification Prep Questions
- Practice Exercise

Chapter 7: Roof Insight

- What is Roof InSight?
- What's Included with Roof InSight?
- How to Order Roof InSight
- Accessing a Roof InSight Data Package
- Chapter 7 Certification Prep Questions

Chapter 8: Drawing a Roof in Sketch

- Sketch View
- Dimensioning Roofs in Sketch
- Understanding Roof Properties and Types
- Changing Roof Shapes
- Drawing Overbuilds
- Basic Roof Variables
- Chapter 8 Certification Prep Questions
- Practice Exercises

Chapter 9: Xactimate Navigation

- Projects Tab
- Xactimate Help
- Data Transfer

Chapter 10: Xactware Pricing Methodology

- Xactware Pricing Methodology
- Pricelist Updates

Chapter 11: Print Reports

- Estimate Reports
- View/Print/Email Reports
- Chapter 9–11 Certification Prep Questions