Getting Started with Xactimate Professional

Welcome to Xactimate Professional, which gives you access to the Xactimate cloud and all three Xactimate platforms – online, desktop, and mobile. In addition to the powerful tools within Xactimate, Xactimate Professional gives you access to many value-adding features, including the following:

- Valuation modules for commercial properties, condominiums, manufactured homes, and agricultural properties
- The Time and Materials feature
- Language packs that translate estimates into French and Spanish
- Multi-version licenses
- The project management and scheduling tool

This guide will help you find where to access these features. For information regarding training, please visit the Xactware Training page.

Installing the Xactimate Professional features

Before you can take advantage of the advanced features available in Xactimate Professional, you will need to install Xactimate version 28 desktop, following the instructions provided with your installation disc or with the email you received when you downloaded the installation software.

Once Xactimate 28 is installed, you can download these features to the desktop platform by making a connection to the Xactimate network. To do this, sign in to Xactimate and click on the Control Center tab. Above the Control Center tab, click on XactAnalysis>Connect. Xactimate will then go through a connection process, which may take a few minutes.

Once this process is complete, exit out of Xactimate and then sign into it again. If the update was successful, you will have a fourth tab next to the Pricelist tab that says Project Management.

Now you are ready to start using Xactimate Professional.

Valuations (Available in the desktop platform only)

The residential, commercial, and agricultural valuation modules allow you to complete a valuation using the same price lists used for estimating.

The Manufactured Home worksheet creates a new valuation for manufactured (mobile) homes. You can select from single-wide, double-wide, or triple-wide homes and then enter upgrades and features.

The Condo—As Built worksheet creates a new valuation for condo policy types that cover only upgrades to the condo. With this policy type, the condominium association insures the unit “as built” or “as purchased,” and the unit owner is responsible for insuring any upgrades. Since this coverage may vary, Xactimate includes many specific questions to accommodate a variety of coverage types.

The Condo—Bare Walls In valuation is for condos with a “bare walls” policy coverage. This policy type covers all real property from the exterior framing inward. Since this coverage may vary, Xactimate includes many specific questions to accommodate a variety of coverage types.
To start a valuation within Xactimate:

Click on the Projects tab at the top of Xactimate.

Select Add to add a new project. The New Project screen above appears. Input the name of the project and choose the appropriate profile. Change the type from Estimate to Valuation.

Choose the type of valuation.

Time and Materials (Available in online and desktop platforms)

Time and Materials allows you to initiate a project and create an estimate using a tabbed-style interface. This increases efficiency by using the tick sheet interface to input materials and equipment, tag macros, and define columns per tab.

Using the Time and Materials mode in Xactimate gives you the ability to input data on a daily basis by labor, materials, equipment, vendor, and additional expenses. Utilizing the new tagging technology, you are able to customize each entry with unique and repeatable data such as franchise number or employee name.

To initiate Time and Materials:

1. Open a project or create a new project in the contractor profile
2. Select the Estimate Items tab and the Items sub tab
3. When the Items sub tab is selected you will see the following options on the far right: Other, Equipment, Materials, Labor, All.

Language Packs (Available in the online and desktop platforms)

You can run Xactimate and print reports in English, French, or Spanish. From the menu bar, select Language, and then select either Spanish or French. After a short pause, the project will close and then reappear in the selected language.

Multi-Version Licenses

This functionality makes it easy for you to support a range of clients requiring different versions of Xactimate without having to switch between different computers or uninstall one version of Xactimate and reinstall another. This means that you will have multiple icons of Xactimate on your desktop. Please contact the carriers with whom you work to find out which version(s) you’ll need.

To download multiple versions of Xactimate, click here.

Project Management and Scheduling

Project Management and Scheduling gives you a powerful, effective management tool that creates a running schedule of work-related activities. Through this, you can view projects, employee schedules, plant lists, and workload allocation information from a single user interface by importing project estimates and assignments directly into it.

The Project Management tab is found next to the Price List tab.
**Xactimate Online**

You don't have to download any software to use Xactimate online, but you MUST take the following action:

1. Obtain an Xactware ID, if you haven’t done so. (To create your Xactware ID, go to [http://www.xactware.com/id](http://www.xactware.com/id) and click on “create one now.”)
2. If you have not already done so, call Xactware sales at 800-424-9228 and ask them to create an online installation for you.
3. Register with Xactimate online by going to [www.xactimate.com](http://www.xactimate.com), logging in with your Xactware ID, and filling out the online registration form.

You are ready to use Xactimate online.

**Xactimate mobile**

**Important:** To use Xactimate mobile, you must first register for an XactNet address in Xactimate online. Follow instructions 1-3 in the previous section to do that.

**Download the Xactimate app**

The Xactimate Mobile application can be downloaded from the App Store for your iDevice or from Google Play for your Android device. The app is free, but you are required to register before you can access price lists, enter items or export estimates.

Once the app has been downloaded and installed on your device, tap on the icon. Enter your Xactimate ID and Password and tap Login.

Tap one or multiple **Profiles** and then **Next** to continue.

You are now ready to start using Xactimate mobile.

**Cloud Technology**

Xactware has been using cloud technology since 1995. Those who are familiar with XactAnalysis have experienced Xactware’s cloud technology including its reliability and security. Xactware’s cloud runs on company-owned servers located at our home office. Backup servers are located at our backup disaster recovery center in New Jersey.

With the release of Xactimate 28 Xactware is extending the use of cloud technology to Xactimate by providing access to assignments from multiple platforms. Estimators can sync data from their desktop platform then open the estimate from their mobile device at the loss location then review and complete the estimate later from any computer that has internet access using the Xactimate online platform.

The Xactimate cloud works when all three platforms of Xactimate are on the most up-to-date version of Xactimate. The mobile and online platforms will always be on the latest version.
When assignments are received in the online platform they may be downloaded locally to any device at any time. Updates made to any assignment are automatically synced with the cloud in the online platform; the same is true for the mobile platform when there is an Internet connection. When assignments are first received at the desktop platform they will need to be manually uploaded to the cloud before they can be accessed from the online or mobile platforms. Additionally, any updates made in the desktop platform must be manually synced to the cloud. This can be done by selecting the project(s) and clicking on the Upload to Cloud button in the Projects tab.

Once projects are synced to the cloud they can be downloaded to any device. Any user with an Xactware ID that the company administrator has added to the Xactimate online instance will be able to view all projects that are stored in the cloud.

Administrators may use the Security Groups feature to manage which users can access specific projects.