

Payment Tracker - Course Summary (Virtual Classroom)

Course Overview

This course provides engaging, interactive training while allowing students to participate in the convenience of their home or office. The Contents Collaboration training course is designed for current users of XactContents who already possess an understanding of the personal property replacement process as it relates to the insurance industry.

Students in this two-hour course will be shown how the Contents Collaboration feature in Xactimate can be utilized for claims assignments to obtain a personal property inventory from the homeowner. This course also demonstrates how Contents Collaboration can be used to obtain receipt information from the homeowner after personal property is purchased and is seamlessly integrated into their XactContents estimates for replacement cost purposes.

Course Prerequisite

Students of this course should meet the following prerequisites before attending class:

- Understand the property loss industry and terminology
 - Knowledge of and familiarity with XactContents
 - Knowledge of and familiarity with Payment Tracker
 - Understanding of the personal property replacement process in relation to insurance losses
- Computer and Internet system requirements:
 - High-speed Internet with Internet Explorer
 - Laptop with Xactimate 28 installed and external mouse
 - Telephone with headset or hands-free capability in close proximity to computer
- Computer skills
 - Comfortable accessing and navigating through the Internet
 - Comfortable navigating Windows and other installed computer software
 - Basic typing proficiency (15+ words per minute)

Course Environment

This course is a two-hour, instructor led, virtual, web training session. Presentation and discussion are directed by a Certified Xactware Trainer. Students view the presentation via web conference and participate using their phone.

Skills and Objectives

Students of this course will learn the following:

- Understand the layout of the Payment Tracker worksheet and its editable columns
- Understand how to manipulate the Payment Tracker for different scenarios to let it calculate applicable totals and save time
- What reports are generated and how to utilize those reports properly
- How the Payment Tracker is useful and utilized for both contents and structural losses