

The Assignment Cycle

- Lesson 1: Introduction to XactAnalysis
- Lesson 2: Creating a Work Assignment or EDI
- Lesson 3: After the Assignment Is Sent
- Lesson 4: The Estimate Is Returned

Setting Up Contractors and Adjusters

- Lesson 1: Qualifying an Assignee to Receive Assignments
- Lesson 2: Setting Up an Assignee to Receive Notifications
- Lesson 3: Setting Up an Assignee's Service Area
- Lesson 4: XactNet Address Book
- Lesson 5: Assignee Certification

The Assignment Queue

- Lesson 1: The XactAnalysis Assignment Queue
- Lesson 2: The Assignment Queue by ZIP
- Lesson 3: The Assignment Queue Search Results

Working with Assignments

- Lesson 1: Assigning a Desk Adjuster
- Lesson 2: Resending an Assignment
- Lesson 3: Resending an Original Assignment
- Lesson 4: Reassigning an Assignment
- Lesson 5: Emailing an Assignment
- Lesson 6: Editing an Assignment's CAT Code
- Lesson 7: Creating a Duplicate Assignment
- Lesson 8: Creating a Referral Assignment
- Lesson 9: Downloading Assignment Details
- Lesson 10: Saving Documents
- Lesson 11: Sending Read-only Estimates
- Lesson 12: Requesting Roof InSight

Estimate Collaboration

- Lesson 1: Defining the Collaborator's Role
- Lesson 2: Setting Up a Collaborator
- Lesson 3: Assigning a Collaborator
- Lesson 4: The Collaboration Assignment in XactAnalysis

The Estimate Review Queue

- Lesson 1: Setting Up a User as a Reviewer
- Lesson 2: Creating Estimate Review Queue Rules
- Lesson 3: Assigning an Estimate for Review
- Lesson 4: Reassigning an Estimate Review
- Lesson 5: Accepting an Estimate Review
- Lesson 6: Reviewing an Estimate's Statuses
- Lesson 7: Reviewing an Estimate with Audit Report Findings
- Lesson 8: Reviewing an Estimate's Sketch Page
- Lesson 9: Creating an Action Item
- Lesson 10: Reviewing an Action Item Comment and Using Notes
- Lesson 11: Updating an Estimate Review with Exceptions
- Lesson 12: Completing an Estimate Review

Setting Up Users

- Lesson 1: Adding a New User
- Lesson 2: Editing a New User's Rights
- Lesson 3: Editing Multiple Users' Rights
- Lesson 4: Program Rules—Setting Up Who Receives Notifications
- Lesson 5: Program Rules—Defining Notifications
- Lesson 6: Personal Rules
- Lesson 7: Column Management
- Lesson 8: User Column Management Organizational Hierarchies
- Lesson 1: Adding a Region
- Lesson 2: Adding a District
- Lesson 3: Adding Adjusters

Organizational Hierarchies

- Lesson 1: Adding a Region
- Lesson 2: Adding a District
- Lesson 3: Adding Adjusters

Monitoring Performance

Lesson 1: Getting Started

Lesson 2: Monitoring Claim Trends

Lesson 3: Monitoring the Activity and Volume of Claims

Lesson 4: Audit Reports

Lesson 5: Using Management and Activity Reports

Monitoring Performance after a Catastrophe

Lesson 1: Getting Started

Lesson 2: Assignment Volume

Lesson 3: Claim Trends

Lesson 4: Reviewing Claim Documents

Lesson 5: Management/Activity Reports

Monitoring Industry Trends

Lesson 1: Getting Started

Lesson 2: Drilling Down

Lesson 3: Report Plot Points

Lesson 4: Comparing Trends

Lesson 5: Retail Labor Trends