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