XactContents eCourse Outline

Introduction
Lesson 1: Getting Started
What is XactContents?
Login and the Xactware ID
The Control Center & Assignments

Lesson 2: Interview
The Interview Tab
The Keyword Search
Vendor Items
Modifying Item Details

Lesson 3: Review & Complete
Marking Estimates Complete
Reports: Contents
Practice Exercise/Assessment

Proficiency
Lesson 1: Getting Started
Creating a New Coverage
Advanced Payments

Lesson 2: Inventory
The XactContents Import Template
Import from Excel
Moving Items between Groups
Drag and Drop Sorting
Re-sequencing Line Items

Lesson 3: Pricing
Skip Pricing
View Column Filters
Refine Search Results
View and Compare Features
System Notes

Lesson 4: Review & Complete
Approving Items
Audit Violations
Reports: Contents Detail
Practice Exercise/Assessment

Fundamentals
Lesson 1: Getting Started
Creating XactContents Projects
Downloading Price Lists
The Claim Info Tab
Coverages
Sublimits

Lesson 2: Inventory
The Inventory Tab
Grouping Folders
Adding Inventory Items
The Summary View

Lesson 3: Pricing
The Pricing Tab
Combined Items
General Quote Items

Lesson 4: Review & Complete
Approving Items
Audit Violations
Reports: Contents Age
Practice Exercise/Assessment

Mastery
Lesson 1: Getting Started
Sublimit Macros

Lesson 2: Inventory
Starting Collaboration
Receiving Collaboration
Distributing Claims Individually
Distributing Claims Evenly
Claim Dashboard

Lesson 3: Pricing
Receiving Distributed Items
Requesting Additional Info
Receiving Additional Info
External Item Sources
Mastery Lesson 3 Cont.:
  Matching Vendor Items
  Emailing Vendor Item Links

Lesson 4: Review & Complete
  Global Changes
  View Filters
  Enter Selector Description
  Audit Violations
  Return to In-Progress Status
  Reports: Cost Comparison
  Assessment

Payment Tracker
Lesson 1: Getting Started
  Group By

Lesson 2: User Interface
  Payment Tracker Layout
  Column Layout

Lesson 3: Payments
  Advance Payments
  Total ACV Settlement

Lesson 4: Entering Receipts
  Entering Receipts
  Partial Receipts
  Grouping Payments
  Pay RC Benefits
  Supplements/Corrections
  Override Deferred Amount

Lesson 5: Reports
  Printing
  History
  Practice Exercise/Assessment