

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

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

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

Mastery

Lesson 1: Getting Started

- Submit 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