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Chapter 1

Xactimate Version 27 System Requirements

**SYSTEM REQUIREMENTS**

**XACTIMATE VERSION 27 STAND-ALONE**

Before installing Xactimate version 27 on your computer, it is critical that your computer meets the minimum system requirements listed below. Xactimate version 27 runs on any desktop, laptop, tablet PC, convertible, or netbook that meets the following system requirements.

- Processor Speed—at least a single-core processor of 1.5 GHz processor.
- RAM—at least 1 GB.
- Hard Drive Space—at least 5 GB of continual free hard drive space and a 5400 RPM drive.
- Monitor Resolution—1024x600 or higher.
- DVD-ROM—A DVD-ROM drive is required to install Xactimate.
- Internet access is required to set up and operate Xactimate.

*Note: Xactimate version 27 does not support Windows 95, 98, ME, NT, or 2000.*

Important! If you have a previous version of Xactimate already installed on your computer, it is critical that you back up your data using the Data Transfer feature before updating to Xactimate version 27, even if you have Multi-Version Install. (If you receive an error message during the data transfer process, resolve that problem before updating to version 27.) The installation of Xactimate version 27 will overwrite Xactimate v.25 on the same computer. Any data that is not backed up beforehand will not be usable in Xactimate v.25 after it is upgraded to Xactimate version 27. After updating to Xactimate version 27, you may need to manually retrieve some assignments from your Xactimate v.25 backup.
Chapter 2

Xactimate Version 27 Installation Instructions

**INTRODUCTION**
This chapter walks you through the installation of Xactimate. It provides you with step-by-step instructions for installing Xactimate on stand-alone computers. By following the instructions in this chapter, you should have Xactimate installed and ready to use in no time at all.

**NOTE REGARDING THE MULTI-VERSION INSTALL**
Because it is common practice for service providers to work for multiple carrier companies at the same time, multiple versions of Xactimate can now be installed on the same computer. When doing so, it is still critical that you back up your data using Data Transfer before performing Multi-Version installs. Each version of Xactimate will have its own icon and database, and it will be registered to display in the “Add or Remove Programs” section of your operating system. Also, each version can be installed and uninstalled separately. If you uninstall the standard version before uninstalling a Multi-Version of Xactimate, the Multi-Version program will be inaccessible. We recommend you make a backup of your Multi-Version data before uninstalling the standard release.

**Attention!** Some profiles are only available in specific versions of Xactimate. The data in these profiles will only be available within the approved version. If you require multiple versions of Xactimate to run all your profiles, you can purchase the Multi-Version Install from www.xactware.com/solutions/claims-estimating/multiple-version-install or by calling 1-800-424-9228.

**Note:** For network installations, see www.xactware.com/27. The following instructions are for stand-alone computers (computers that do not share data with other computers) only.

Before installing Xactimate on your computer, it is critical that your computer meets the minimum system requirements for Xactimate. These requirements are listed in “System Requirements” on page 12.
NEW AND MULTI-VERSION INSTALLS

1. Make sure you have an active connection to the Internet. Close all open applications.

2. Insert the Xactimate DVD into your computer. The installation procedure should begin automatically. If the Xactimate setup does not begin immediately, follow these steps:
   
   For Windows XP,
   a. Click the Windows Start button.
   b. Click Run.
   c. Type D:\setup.exe in the Open field.
      
      If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
   d. Click OK.
   
   For Windows Vista,
   a. Click the Windows Start button.
   b. In the Start Search field, type D:\setup.exe.
      
      If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
   c. Press Enter on your keyboard.
   
   For Windows 7,
   a. Click the Windows Start button.
   b. In the Search programs and files field, type D:\setup.exe.
      
      If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
   c. Press Enter on your keyboard.
   
   In Windows Vista and Windows 7, you may be prompted to allow the setup.
Select **Yes**.
The Xactimate Install Wrapper—InstallShield Wizard appears.

3. Select the language for the install and click **OK**. The Installation Setup procedure begins.
An InstallShield Wizard informs you that Xactimate requires certain programs to run correctly.

4. Click **Install**.

   **Note:** These are Microsoft applications that are required to run Xactimate. Even if it is already installed on your computer, this window appears so Xactimate can validate the existence of the correct version of the program and then install any required programs that are needed.
5. Click **Yes** to restart your computer if required.

6. Once your computer has rebooted, click the **Install** button.

   The installation procedure should begin automatically. If the Xactimate installation does not begin immediately, go back to step 2 to start the install.

   The License Agreement appears.
7. After reading the license agreement, click the **I accept the terms in the license agreement** radio button, then click **Next**.

The *Install Type* window appears.

8. Select your installation type and click **Next**.

The CD Key window appears.

9. Type the 20-character key code found on the back of your product packaging.
10. Select one of the following:
   - If you need a new XactNet address, choose the **I don’t have an existing XactNet address** radio button.
   - If you have an existing XactNet address, choose the **I already have an XactNet address and want to recover it** radio button and follow the steps below:
     1. Enter the e-mail address that was used previously to register with XactAnalysis.
     2. Select the **Request an e-mail with Security Codes** link.
        Within a few minutes, Xactware will send a message to the e-mail address you entered. This e-mail message will contain a security code.
     3. Type (or paste) the security code into the appropriate field.

11. Click **Next**.

12. Select one of the following:
   - **Express** button to install all versions of Xactimate needed to work with the profiles on your CD Key
   - **Advanced** button to manually select the Xactimate version(s) you wish to install

   *Note: Xactimate v.25 Multi-Version Install is *not* supported on 64-bit operating systems.*
13. Click **Next**.

The installation process begins.

A progress bar shows you the progress of the installation. This will take several minutes; do not cancel the installation while the configuration is running.
14. Once the configuration is complete, click **Finished** to launch Xactimate version 27. The **Login** window appears.

Congratulations. You have successfully installed Xactimate version 27.

If you installed Multi-Version Installs, you will see icons on your desktop for each version of Xactimate that was installed.

You are now ready to begin using Xactimate.
UPGRADING FROM XACTIMATE V.25 TO XACTIMATE VERSION 27

If you are upgrading from Xactimate v.25 to Xactimate version 27, Xactimate will create a backup of any important Xactimate v.25 data by using the Data Transfer backup feature during the update.

1. Make sure you have an active connection to the Internet. Close all open applications.
   
   Setup should start automatically when the DVD is inserted. If not, follow the instructions in “New and Multi-Version Installs” on page 14, starting with step 2 to begin the install.
   
   In Windows Vista and Windows 7, you may be prompted to allow the setup.
   
   ![User Account Control dialog]

   Select **Yes**.
   
   The Xactimate Install Wrapper—InstallShield Wizard appears.
   
   ![Xactimate Install Wrapper - InstallShield Wizard]

   Select the language for the installation from the choices below.
2. Select the language for the install and click **OK**. The Installation Setup procedure begins. An InstallShield Wizard informs you that Xactimate requires certain programs to run correctly.

   ![InstallShield Wizard](image)

   **Xactimate Install Wrapper - InstallShield Wizard**

   Xactimate Install Wrapper requires the following items to be installed on your computer. Click Install to begin installing these requirements.

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<th>Status</th>
<th>Requirement</th>
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<tr>
<td>Pending</td>
<td>Windows Installer 4.5 for Windows XP SP2 and later (x86)</td>
</tr>
<tr>
<td>Pending</td>
<td>Microsoft SQL Server Express Xactware</td>
</tr>
</tbody>
</table>

3. Click **Install**.

   **Note:** These are Microsoft applications that are required to run Xactimate. Even if it is already installed on your computer, this window appears so Xactimate can validate the existence of the correct version of the program and then install any required programs that are needed.

4. Click **Yes** to restart your computer if required.
5. Once your computer has rebooted, click the **Install** button.

   The installation procedure should begin automatically. If the Xactimate installation does not begin immediately, go back to step 2 to start the install.

   The License Agreement appears.

6. After reading the license agreement, click the **I accept the terms in the license agreement** radio button, then click **Next**.

   The **Install Setup** window appears.
7. Select **Express** to install all versions of Xactimate needed to work with the profiles on your CD Key, or **Advanced** to manually select the versions of Xactimate to install.
8. Click **Next**. The upgrading process begins.

A progress bar shows you the progress of the upgrade. This will take several minutes; do not cancel the installation while the configuration is running.
9. Once the configuration is complete, click **Finished** to launch Xactimate version 27. The Login window appears.

![Login Window](image)

Congratulations. You have successfully upgraded to Xactimate version 27.

**Note:** After updating to Xactimate version 27, you may need to manually retrieve assignments from your Xactimate v.25 backup that previously existed in certain profiles.

You’re now ready to begin using Xactimate.
Chapter 3
Xactimate Version 27 Basics

INTRODUCTION
There are a number of basic steps you must follow to begin estimating in Xactimate. This chapter lists them in the approximate order you’ll need to follow them.

- “Login” on page 29
  - “Security Groups” on page 29
  - “Change Password” on page 30
  - “Users” on page 30
- “Registering” on page 32
  - “Connecting to XactAnalysis” on page 33
  - “Finding your XactNet address” on page 34
- “Download a price list” on page 35
- “Preferences” on page 36
  - “Price List” on page 36
  - “Company Header” on page 36
  - “Opening and Closing Statements” on page 37
- “Data Transfer” on page 39
  - “Transferring Data” on page 39
  - “Retrieving data” on page 40
  - “Backing up data” on page 40
  - “Restoring Backed-up data” on page 41
- “Project SmartList” on page 42
  - “Creating an estimate or valuation” on page 42
“Estimating” on page 43
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- “Estimate Items” on page 48
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“Upload assignments” on page 53
**Login**

To use Xactimate version 27, you must first log in.

1. Double-click the **Xactimate 27 icon** on your Windows desktop.
   
The **Xactimate Login** window appears

   ![Xactimate Login Window](image)

2. Type **SUPER** in the **User ID field**, then type **super** in the **Password field**.
   
   **Note:** Your supervisor may have already set you up with a specific user ID and password. If so, use these instead.

3. Click the **Profile drop-down** to select the profile you want to log in under.

4. Click the **OK** button.

   Xactimate opens into the Control Center.

   **Note:** Some profiles require a different user ID and password. You can contact your account rep. for more information on profile-specific user IDs and passwords.

**Security Groups**

Security groups are sets of access rights that determine the program features available to each user. Concern about security can vary dramatically, depending on the type of user. Some organizations need to restrict access to certain features, while others allow full access to all options. If security is not an issue for your organization and you already have full rights, then you can ignore this feature.

In a security-conscious environment, a system administrator normally defines different security groups that provide the degree of program access required by different types of users.

To create a security group,

1. In the Xactimate Control Center, click the **Services** menu, then choose **Security Groups**.

   The **Security Group SmartList** appears.

2. Click **Add**.

   The **Security Group Setup** window appears.

3. Enter a code (you can create this code on the spot) and a description for the new security group.
4. Select the areas that members of the new security group will have access to.

You can select all of the components of a security category by clicking the box to its left.
If you want to select certain components of a category, but not others, click the plus symbol to expand the category, then select only the components of your choice.

5. When you’ve completed your selections, click **OK**, then click **Close** to exit the **Security Group SmartList**.

You can see how to add a security group to any of your users by reviewing “**Users**” on page 30.

**CHANGE PASSWORD**
You can change your password at any time.

Passwords are case-sensitive. Sample passwords could include x9z712, bonZo, HeresLookingAtYou, etc. Try to select something that you will remember readily, but that isn’t easy for someone else to guess. For example, avoid using the names and birthdays of family members.

To change your password,

1. In the Xactimate Control Center, click the **Services** menu, then choose **Change Password**.

   The **Password** window appears.

2. Type your current password into the **Old Password** field.

3. Type the new password in the **New Password** field; type it again into the **Confirm New Password** field.

4. Click **OK**.

   Your password has now been changed.

**Note**: Xactimate assumes you are currently logged in as yourself when performing this function.

By default, Xactimate is set up so that entering passwords is optional. You can modify your preferences so that passwords are not required at all, or that they are required by everyone. See “**To disable the Password feature**” on page 116, step 2.

**USERS**
If you have the proper rights, you can add new users who can work in Xactimate. To do this,

1. Click the Control Center **Services** menu, then choose **Users**.

   The **User/Resource SmartList** appears,

2. Click **Add**.

   The **Add New User/Resource** window appears

3. Enter the ID of the new user in the **Enter new user ID** field and click **OK**.

   The user ID can be anything you want; it is often the user’s initials.

   The **User Information** window appears.

4. Enter the name and title of the new user.

5. If this user will be assigned a different security group than the default, click the **Security Group SmartList button** to select from the available groups.
6. If you want to assign a password to this user, click **Change Password**.
   
   The **Password** window appears.

7. Type the password in the **New Password** field. Type it again in the **Confirm new password** field.

8. Click **OK** to return to the **User Information** window, then click **OK** again to return to the **User/Resource SmartList**.
   
   You can repeat **steps 2–8** to add as many users as necessary.

9. Click **Close** to exit the **User/Resource SmartList**.
REGISTERING
Before going any further, you should register your Xactimate. This allows Xactware and other companies running Xactimate to communicate with you and send you assignments, price lists, upgrades, and other SmartObjects.

To register with Xactware for the first time,

1. From the **Control Center main window**, click **Register with XactAnalysis** near the upper-right corner to see the **Pre-Registration** window.

2. Click the **I don't have an XactNet address and need a new one** radio button, then click **OK**. The **License Agreement** window appears.

3. Click the **Agreement Link** button.
   Your web browser opens, and the **XactAnalysis Subscription and Software Usage Agreement** appears.

4. Read through this agreement, then close your web browser, return to the **License Agreement** window, and click **Accept** to see the **Online Registration** window appears.

5. Type your company name, address, and phone information in the proper fields.

6. Type your e-mail address twice in the fields provided.
   This step is optional, but useful if you think you may need to re-register at any point.

7. Type a contact name and your user name in the fields provided.

8. In the **XactNet Address** field, enter an XactNet address that you create.
   You can create this XactNet address on the fly, using a format such as COMPANYNAME.CITY STATE.

9. Click **OK**.
   Xactimate lets you know you’ve registered successfully.

   *Note: In the unlikely event that the XactNet address you entered is already registered to another user, an error message appears, informing you that you have selected an invalid XactNet address. If this occurs, enter a different XactNet address (an abbreviation of your company name, for example) and click OK.*

To re-register with Xactware,

1. From the **Control Center main window**, click **Register with XactAnalysis** near the upper-right corner.
   The **Pre-Registration** window appears.

2. Click the **I already have an XactNet address and want to recover it** radio button.
   The **Existing Registration Options** portion of the window becomes active.

3. Click the **Enter e-mail address associated with previous XactNet Address** radio button.

4. Type the e-mail address that was used to register Xactimate the last time it was registered, then click **OK**.
5. Click **OK** at the Xactware window to confirm that you received its message.

   Within a few minutes, Xactware sends a message to the e-mail address you entered. This e-mail message contains a security code. If you don’t see this e-mail within a few minutes, you might want to check your e-mail spam folder.

6. Highlight and copy **(Control-C)** this code in your e-mail program, then return to Xactimate.

7. Click **Register with XactAnalysis** again.

   The **Pre-Registration** window appears again.

8. Click **I already have an XactNet address and want to recover it**, then click **Enter previously sent security code to complete registration**.

9. Type the e-mail address you entered in the **Pre-Registration** window, then type (or paste) the security code into the appropriate field.

10. Click **OK**.

    Xactware displays a Registration was successful message.

11. Click **OK**.

    You are now registered with XactAnalysis.

**CONNECTING TO XACTANALYSIS**

Whenever you want to download messages from another Xactimate user, receive an assignment from XactAnalysis, or send anything back to XactAnalysis, you must connect to XactAnalysis.

Connecting to XactAnalysis is a simple process that consists of the XactAnalysis network delivering the SmartObjects (data files) in your Outbox, and downloading SmartObjects that have been sent to you and placing them in your Inbox. This process often takes only a minute (although it might take longer if you are uploading/downloading assignments, price lists, or other large SmartObjects).

To connect to XactAnalysis,

1. In the **Control Center**, click the **Control Center** tab.

   The Control Center **Dashboard** page appears.

2. Click **Connect** near the upper-right corner.

   The **XactAnalysis Connection** window appears. You will see the status on this window change from **Not Connected** to **Handshaking** to **Connected**, then back to **Not Connected**.

3. Click **Done**.

   The XactAnalysis Connection window closes, and the SmartObjects that were downloaded can now be found in your **XactAnalysis Communications Inbox**. Any items that were in your **XactAnalysis Communications Outbox** were sent to their proper destinations.
**FINDING YOUR XACTNET ADDRESS**

Your XactNet address was created when you (or someone using this computer) registered with XactAnalysis the first time. If you were not the person who created this address, or you have forgotten it, you can follow these steps to determine your XactNet address.

1. From the Control Center, click the Help menu and choose About Xactimate.

   The About Xactimate window appears. Your XactNet address appears near the bottom of this window.
DOWNLOAD A PRICE LIST
You can request price lists from Xactware by using the Download Price List feature, found in the Control Center.

Note: You must be a registered XactAnalysis user before you can use this feature.

Most users will request an Xactware price list. To request an Xactware price list,

1. From the main Control Center toolbar, click Services, then Request price list(s) from XactAnalysis, and Xactware price list.
   The Request Price List window appears.

2. Select the price list(s) you need by using the attached SmartLists to specify a location (Country, State/Province and City).
   You can select more than one, as long as they’re all in the same state or province.

3. In the bottom portion of this window, indicate if you want the ZIP/Postal Code table, and whether you want the price list for all profiles.

4. After making your selections, click the Download Now button.
   A window appears advising you that the price lists have been downloaded and are now available to use.

   Note: If you are downloading price lists for more than one profile, the Download Now button will not be available to be selected. You must click Send and then connect to XactAnalysis (see “Connecting to XactAnalysis” on page 33) to finish this procedure.

5. Click Done.

6. When Xactimate informs you that the price lists are ready to use, click OK.
   The price lists now appear in your Price List SmartList when you click the Price List tab in the Control Center.

You can request a custom price list if a supervisor or an associate has created a custom price list and uploaded it to XactAnalysis.

1. From the Control Center, click the Services menu, then highlight Request price list(s) from XactAnalysis, and choose Custom price list.
   The Request Price List window appears.

2. Type the exact name of the price list in the field provided, then click Download Now.
   The price list is downloaded and is ready for use in your Price List SmartList.
PREFERENCES
Preferences are a way to set up Xactimate so that it uses defaults you want instead of the defaults that came with Xactimate. You can set up such defaults as price list, company header, and opening statements.

The system preferences you are about to set up can be overridden for an individual user or for each estimate; you are not forced to use these preferences if they don’t fit every project.

PRICE LIST
To set up a default price list for your estimates,

1. From the Control Center main page, click the System Settings tab.
   The System General page appears.

2. In the navigation tree to the left, click Defaults under Project.
   The Defaults page appears.

3. In the Price List area, click the Default Price List radio button, then click the Price List SmartList button.

4. Select the price list you want to use as a default for all your estimates, then click OK.

5. If necessary, select a tax jurisdiction to go with this price list and click OK.

6. Click the Dashboard tab (or any other tab in the Control Center).
   Xactimate asks if you want to save these changes for all users.

7. Click Yes.

Note: You can also set up these preferences for an individual user (instead of all users) by substituting User Preferences for System Settings in step 1, then following steps 2–7 as written.

COMPANY HEADER
You can set up Xactimate so that one specific company header is entered by default into all projects created. To do this, you must first create the company header you want to use.

To create a company header,

1. From the Control Center main page, click the Document Modules tab.
   The Document Modules page appears, with the Company Header SmartList at the top of the page and the Model Statement SmartList at the bottom of the page.

2. Under the Company Header section, click the Add button.
   The Add Company Header Information window appears.

3. Enter a code for this company header in the Code field.
   This is a code you make up on the fly to represent this particular company header. For example, if you work for a company named ABC Contractors, you might want to simply give this header the code ABC.

4. Type the company name and info (such as address, phone number, slogan, etc.) in the appropriate fields.

5. If you want to add a graphic image (such as your company’s logo) to the company header, click Import.
6. Browse through your hard drive/network to highlight the .jpg file you want to add to the company header, then click **Open**.

   **Note:** If your company header graphic is larger than 624x218 pixels, it will automatically be resized to fit the space available. If you don’t like the look of the resized graphic, you might consider resizing it yourself (in a paint program, such as Microsoft Paint) before importing it.

7. Click **OK** to add this company header to the **Company Header SmartList**.

To make a company header the default for your estimates,

1. From the **Control Center main page**, click **System Settings**.
   
   The **System Settings General** page appears.

2. In the navigation tree to the left, click **Defaults** under **Project**.
   
   The **Project Defaults** page appears.

3. In the **Administrative Defaults** section, click the **Company Header SmartList button**
   
   then select the company header you want to use as default and click **OK**.

4. Click the **Dashboard** tab (or any other tab in the **Control Center**).
   
   Xactimate asks if you want to save these changes for all users.

5. Click **Yes**.

You can also set up a default company header for yourself only (instead of all users) by following these steps from the **User Preferences Project Defaults** page instead of the **System Settings Project Defaults** page. Any defaults set up in **User Preferences** will override defaults set up in **System Settings**.

You can override both User Preferences and System Settings defaults within any estimate.

**OPENING AND CLOSING STATEMENTS**

You can set up Xactimate so that specific opening and closing statement are entered by default into all projects created. To do this, you must first create the model statements you want to use.

To create an opening statement,

1. From the **Control Center main page**, click the **Document Modules** tab.
   
   The **Document Modules** page appears, with the **Company Header SmartList** at the top of the page and the **Model Statement SmartList** at the bottom of the page.

2. Under the **Model Statement** section, click the **Add** button.
   
   The **Statement** window appears.

3. Enter a code for this opening statement in the in the **Model Name** field.
   
   This is a code you make up on the fly to represent this particular statement. For example, if you want the default opening statement to be a generic greeting, you might name this model **Hello**.

4. Type the text of the statement in the large field below the **Model Name** field.

5. Click the **File** menu and choose **Save**, then click the **File** menu again and choose **Exit** to add this model statement to the **Model Statement SmartList**.
To make a statement the default for your estimates,

1. From the Control Center main page, click System Settings.
   
   The System Settings General page appears.

2. In the navigation tree to the left, click Defaults under Project.
   
   The Project Defaults page appears.

3. In the Administrative Defaults section, click the Opening Statement SmartList button or the Closing Statement SmartList button, then select the statement you want to use as default and click OK.

4. Click the Dashboard tab (or any other tab in the Control Center).
   
   Xactimate asks if you want to save these changes for all users.

5. Click Yes.

You can also set up a default opening statement for yourself only (instead of all users) by following these steps from the User Preferences Project Defaults page instead of the System Settings Project Defaults page. Any defaults set up in User Preferences will override defaults set up in System Settings.

You can override both User Preferences and System Settings defaults within any estimate.
DATA TRANSFER
The Data Transfer feature allows you to transfer data to any path or removable drive on your hard drive or network. This is useful if you want to share projects or back up data.

TRANSFERRING DATA
You can transfer data for any number of reasons, including backups and allowing another computer to read the data.

Note: If you plan on backing up all Xactimate files, we recommend you use the Data Transfer Backup feature (page 40).

To backup your data, follow these steps:

1. From the Control Center main page, click the Services menu, then choose Data Transfer.
   The Data Transfer window appears.

2. Verify that Folder is selected in the Transfer Type area, and Send in the Action area.

3. In the To field, enter the path you will transfer the data to.
   If you’re sending your data to a removable media drive (e.g., flash drive), enter the drive letter. If you’re sending your data to a location on a network drive, enter the network path you will use to send the data. Click on the Browse button to help you find the correct path.

4. Click Next.
   Xactimate displays the types of data that are available for you to send to the data path selected.

5. Highlight the type of data you want to send (e.g. project, price lists, macros, etc.) in the field on the left, then click the items you want to send in the SmartList to the right.
   You can select multiple items by holding the Control key while highlighting each item, or you can select a range of items by clicking an item, then holding the Shift key and clicking another item (this selects all items between the two items you clicked).
   Xactimate displays the number of items in each category to the right of the category type.

6. Repeat this step with any categories you need to transfer.
   This includes price lists, company headers, model opening statements, macros, Sketch templates, report templates, claim rep/estimators, references, price list filters, contractors, system tables, and note templates.

7. With the appropriate data selected, click the Send button.
   When all the data has been sent to the selected folder, Xactimate will display the results of the transfer.

8. Click Save or Close to save the transfer data or close the window.

Note: You will need to repeat this process for each of the Xactimate profiles that you have installed. Log into each profile and save the data for each profile to a separate location (e.g., a different thumb drive, or a different network folder).
RETRIEVING DATA
You must make sure you’re in the same profile that the data was originally transferred from.

1. From the Control Center, click Services, then choose Data Transfer.
   The Data Transfer window appears.

2. Verify that Folder is selected in the Transfer Type area, and Retrieve in the Action area.

3. Enter the path you want to retrieve your data from in the Retrieve data From field, or use the Browse button to select a path.

4. Press Next.
   Xactimate displays the types of data that are available for you to retrieve from the data path selected.

5. Highlight the type of data you want to retrieve (e.g. project, price lists, macros, etc.) in the field on the left, then click the items you want to retrieve in the SmartList to the right.
   You can select multiple items by holding the Control key while highlighting each item, or you can select a range of items by clicking an item, then holding the Shift key and clicking another item (this selects all items between the two items you clicked).
   Xactimate displays the number of items in each category to the right of the category type.

6. Repeat this step with any categories you need to retrieve.
   This includes price lists, company headers, macros, Sketch templates, claim rep/estimators, references, price list filters, and contractors.

7. Once you have all of the data selected, click the Retrieve button.
   Xactimate displays the results of the data transfer.

8. Click Safe or Close.

BACKING UP DATA
To protect your data from accidental loss, we recommend regular backups. The Data Transfer Backup feature backs up all your Xactimate data.

1. From within the Xactimate Control Center, click on the Services menu and choose Data Transfer Backup.
   The Data Transfer Backup window appears.

2. On the Data Transfer Backup window, select Send as the action.

3. In the To field, enter the path you will use to transfer the data.
   - If you’re sending your data to a removable media drive (thumb drive, external hard drive, etc.), enter the drive letter.
   - If you’re sending your data to a location on a network drive, enter the network path you will use to send the data.
   You can use the Browse button to find the correct path.

   Note: Avoid saving your backup to the same hard drive where your data is located; if that hard drive should fail, you would lose your backup as well as your original.
4. After you have selected the correct path, click the **Send** button at the bottom of the window to back up all Xactimate data to the location you selected.

When the backup process is finished, the **Backup Progress** window disappears.

**RESTORING BACKED-UP DATA**

If you make regular backups, you can replace lost or damaged files with clean program files by using Data Transfer Backup. This includes all estimates, price lists, contact data, etc.

*Note:* When using the Data Transfer Backup feature, it is **critical** that you restore your data to the exact version and build number of Xactimate that you backed it up from. Restoring into other versions of Xactimate could result in a loss or damage of data.

To restore all Xactware data and system files,

1. From the Xactimate Control Center, click the **Services** menu and select **Data Transfer Backup**.

The **Data Transfer Backup** window appears.

*Note:* All project windows and other modules must be closed before restoring Xactimate.

2. Under **Action**, click **Retrieve**.

3. In the **From** field, enter the path where you saved the backup.

*Note:* Backed-up data can only be restored to the same drive letter and directory structure it was backed up from. You should not use this feature, for example, if your intention is to back up from drive C: and then re-install Xactimate to drive D: and restore your data to that drive.

4. Click the **Retrieve** button.

Xactimate restores all your program files.

*We recommend that you make regular backups of your data.*
PROJECT SMARTLIST

The Control Center Projects window is where your projects are stored. You can see it by clicking the Projects tab from the Control Center. This page contains the Projects SmartList, which is where you manage your projects.

CREATING AN ESTIMATE OR VALUATION

To create a new project,

1. Click the Project tab from the Control Center.
   The Projects window appears.

2. Click Add.
   The New Project window appears.

3. Type a name for the project in the Project field (or keep the project name automatically created by Xactimate).
   The name can consist of letters, numbers, or both but cannot contain any spaces. Letters always appear in uppercase.

4. Click the Profile drop-down to select the Xactimate profile you want this project created in.

5. Click the Type drop-down to select the type of project you’re creating.

6. Click the Label drop-down if there is a label you want to assign to the project.

7. Click the OK button.
   The project opens and you can begin working on it.
ESTIMATING
The ability to estimate a project is the core of Xactimate.

There are four estimating windows: Claim Info, Sketch, Estimate Items, and Complete.

1. Click the Claim Info tab to enter administrative data on the insured, the property, the estimate itself, and the job.
   - You must fill in most of the fields in the Insured Info, Coverage/Loss, and Parameters windows.
   - You can choose to enter information in the Loss Recap and Activity Report windows, as well as view reports from the Claim Reports window.

2. Click the Sketch tab. Create your Sketch drawing first, then use graphical estimation to add the correct price list item.
   - You can choose to skip Sketch if you prefer to add rooms and line items in the Estimate Items and Summary windows instead. Or you can create the rooms in Sketch and then add the line items in Estimate Items and Summary.

3. Click the Estimate Items tab to create, dimension, and/or enter line items for any rooms you don’t create in Sketch.
   - Estimate Items combines Grouping, Dimensioning, and Line Item Entry.

4. Click the Complete tab to see where you might have missed important information and then mark your estimate as complete.

CLAIM INFO
The Claim Info page is where you enter all administrative information regarding the estimate. You can see this window by clicking the Claim Info tab from anywhere within an estimate. This window consists of six pages: Insured Info, Coverage/Loss, Parameters, Loss Recap, Claim Reports, and Activity Report.

To fill in the Claim Info pages,

1. Open an estimate and click the Claim Info tab.
   - The Insured Info page appears under the Claim Info tab by default.

2. Type the insured’s name in the Name field.

3. Click the Address drop-down to select the type of address you want to enter.
   - By default, you can choose from billing, business, home, and property.

4. Enter the address for insured, based on the address type you selected in step 3.
   - You will need to fill in the Street, City/St/Zip, and Country fields.

5. Click the Phone drop-down to select the type of phone number you want to enter.
   - By default, you can choose from business, cell, fax, home, and pager.

6. Type the insured’s phone number into the Number field, followed by any extensions, if necessary.

7. Type the insured’s e-mail address in the E-mail field.
   - This step is optional.
8. Enter the appropriate dates in the *Date of Loss*, *Date Contacted*, *Date Received*, and *Date Inspected* fields.

*Date Entered* is already added for you, as this date represents the date you added the estimate to Xactimate; e.g., today.

9. Click the **Claim Rep SmartList button**.

The *Claim Rep SmartList* appears.

10. To add a claim rep to the SmartList,
   a. Click **Add**.
   
   The *Add Claim Rep window* appears.
   b. Fill in the fields in the *Claim Rep* tab.
   c. Click the **Detail** tab, then enter as many fields as necessary in the *Detail window*.
   d. Click **OK**.
   
   The claim rep appears in the *Claim Rep SmartList*.

11. Highlight the claim rep you just created and click **OK**.

   The claim rep appears in both the *Claim Rep* field and the *Estimator* field.

12. Fill in any additional fields in the *Personnel* area as necessary for this estimate.

13. Click the **Coverage/Loss** tab.

   The *Coverage/Loss* window appears.

   ![Coverage/Loss window]

   Type the estimate’s claim and policy numbers in their appropriate fields.

14. Click the **Type of Loss drop-down** and choose the type of loss.

15. Click the **Cause of Loss drop-down** and choose a cause for the loss.

   The rest of the fields on this page are optional and can be filled in depending on the results you’re looking for.
16. Click the **Parameters** tab.

The **Parameters** window appears.

17. Click the **Price List SmartList button**.

18. Highlight the price list you want this estimate to use and click **OK**.

If you plan on using the default price list, you can skip this step.

19. Click the **Tax Jurisdiction SmartList button** and click the tax jurisdiction you will be using for this estimate. Click **OK**.

20. Enter the overhead and profit percentages you want to use for this estimate, then click the **Cumulative O&P** checkbox if you plan on figuring profit based on the overhead added in.

The company header and opening statement will be the same as the ones you added as defaults for your estimates. If you want to accept the defaults, skip the next steps and move on to the next section, “**Sketch**.”

21. Click the **Company Header SmartList button** and click the company header you want to use for this estimate, then click **OK**.

22. In the **Report Text** area, click **Model** if you have already created the opening and closing statements you want to use, or click **Edit** if you want to create opening and closing statements specific to this estimate only.

If you click **Model**,

a. Click the opening statement you want to use for this estimate.

b. Click **OK**.

c. Click **Yes** to confirm that you want to replace your opening statement.
If you click *Edit*,

a. Type the text you want to appear as your opening statement.

b. Click the **Save and Exit** button.

You have now entered the basic Claim Info information for your estimate.

See “Xactimate Version 27 How-Do-I? Help Topics” on page 96 for help topics that cover some of the most frequently asked questions regarding the *Claim Info* pages.

**SKETCH**

Sketch allows you to draw an accurate graphical representation of the rooms you’re estimating, very similar to a floor plan. As you create your drawing in Sketch, several variables are calculated to save you time while scoping an estimate.

You can use Sketch to dimension your rooms and add line items; you don’t have to use the Estimate Items or Summary if you don’t want to do so. Or you can dimension in Sketch and add line items in Estimate Items or Summary; whatever works best for your estimating style.

To estimate in Sketch, you should first fill in your *Claim Info* pages. After that, click the **Sketch** tab.

1. Create a basic floor plan in Sketch.
   
   You do this by drawing rooms.

![Diagram of a basic floor plan with rooms labeled Room1, Room2, Room3, Room4, Room5, Room6.](image)

See:

- “To create a simple room in Sketch” on page 211
- “To cut and paste a room in Sketch” on page 214
- “To copy and paste a room in Sketch” on page 207
- “To copy a room from the underlay in Sketch” on page 208
- “To add joining rooms in Sketch” on page 204
2. Add doors, windows, missing walls, levels, and roofs. Create staircases. Assign names to the rooms and define subrooms. Add notes and photographs.

See:
- “To add higher levels in Sketch” on page 204
- “To add lower levels in Sketch” on page 205
- “To create subrooms in Sketch” on page 213
- “To place a door on a wall in Sketch” on page 216

You can also see “Sketching the Floor Plan” on page 58 for a tutorial on creating a floor plan.

3. Use one of the graphical estimation methods to add line items to your estimate.

You can also see “Line Item Entry” on page 79 for a tutorial on the methods of line item entry, including graphical estimation.
ESTIMATE ITEMS

The Estimate Items window allows you to create, edit, or review all items for your estimate. It has three basic sections: Grouping, Dimensioning, and Line Item Entry.

Once you group and dimension rooms using Estimate Items, you must add line items to these rooms using Estimate Items; you cannot use graphical estimating (Sketch) to add line items to rooms not created in Sketch.

To create the rooms in an estimate, you should first fill in your Claim Info pages. After that, click the Estimate Items tab.

1. In the Grouping pane, click Add.

The New Group window opens.

2. Click the Name SmartList button and click a room name that fits the room you’re adding, then click OK.
   This fills in both the Name and Code fields. If you prefer, you can type text directly into these fields.

3. Select a coverage type for this room, or do nothing to accept the default.

4. If you will be adding more rooms/grouping items, click the Continuous Add checkbox.
   You can off the Continuous Add checkbox before you finish adding your last room, or click Cancel after adding it.

5. Click Attach.

When you add your first room, the Attach button is the only one active. After you’ve added the first room, you can click Append, Insert, or Attach.

- **Append** adds a room below the currently selected grouping item and at the same level
- **Insert** adds a room above the currently selected room and at the same level.
- **Attach** adds a room below the currently selected grouping item and at one level below the selected item.

If you are not adding additional rooms, continue to step 7.
6. Repeat steps 2–5 for each new line item, then click Appends, Inserts, or Attaches, depending on how you want these rooms to appear in your Grouping pane.

Once you’ve added all the rooms to an estimate, you can dimension the rooms.

7. Double-click the room you want to dimension in the Grouping pane.

The Group Info window appears.

8. Click Add.

The Add Dimensioning window appears.

9. Select the shape that matches the room (or the room’s largest segment) from the shape drop-down.

Most rooms are based on rectangles, so Box is the default shape.

10. Enter the dimensions in the fields below the graphic and click the OK button.

The Add Dimensioning window disappears and the dimensions for this room appear in the Dimension window.

   Note: If the dimensions don’t appear immediately, close the Group Info window, then open it again.

11. If the room has one or more subrooms (such as a closet or an offset),

   a. Click Add from the Group Info window.
   
      A new Add Dimensioning window appears for you to add the subroom information.

   b. Click the Subroom Name SmartList button, highlight a name for this subroom, then click OK.

   c. Click the Shape SmartList button, highlight the shape the best fits this subroom, then click OK.

   d. Enter the length, width, and height of this subroom.

   e. Click the Missing Walls button.
      
      The Missing Walls SmartList appears, and since you don’t have any other missing walls in this room, the Add Missing Wall Information window also appears. (You can click Add from the Missing Walls SmartList if the Add Missing Wall Information window does not appear.)

   f. Enter the length and height of the missing wall (between the subroom and the main portion of the room).
      
      By default, the room length and room height is entered as the length and height of the missing wall.

   g. Click the Opens Into drop-down button to select the subroom (or exterior) this subroom opens into.

   h. Type the quantity of missing walls that fit this description.

   i. Click the button that fits the description of the missing wall. You can choose from:

      – Open at neither top nor bottom.
      
      – Open at top.
      
      – Open at bottom.
      
      – Open at top and bottom.

      If the height of the missing wall is the same as the height of the subroom it opens into, you can only choose Open at top and bottom. If the height is less than the height of the subroom it opens into, you cannot choose this option.

   j. Click OK to close the Add Missing Wall Information window.

   k. Click Close to close the Missing Walls SmartList.

   l. Click OK to close the Add Dimensioning for [room] window.

The subroom has been added to the room. Repeat these steps for each subroom that makes up a portion of this room.
12. Repeat steps 7–11 for all rooms in the estimate. You're now ready to add line items to the estimate.

13. Highlight the room you want to add a line item to in the Grouping pane.

14. In the Line Item Entry pad (in the center of the window), click the Category SmartList button.
   The Category SmartList displays all of the available categories you can choose from, as well as a description of each category. These categories are sorted by a three-character code.

15. Highlight the category that contains the line item you’re entering and click OK.

16. Click the Selector SmartList button.
   The Selector SmartList displays a list of all line items available in the category you selected in step 15, as well as a description of each.

17. Highlight the specific line item you’re entering and click OK.
   Xactimate fills in the Line Item Entry pad with the defaults assigned to this line item.

18. Check the defaults of the remaining fields. Make changes as needed, then click OK.
   You can look up any of the following terms in the Xactimate RTT (Real Time Training) pane for further definitions of the fields on the Line Item Entry pad.
   - Category
   - Selector
   - Activity
   - Calculation
   - Calculator
   - Quantity
   - Unit of Measure
   - Unit Price
   - Depreciation
   - Miscellaneous Item
   - Line Item Attachments
   - Age
   You can see the RTT pane by clicking Help from the upper right corner of the Xactimate window.

19. Repeat steps 14–18 until you have entered all of the items required for the selected room. Repeat the entire procedure as needed for all other rooms in the estimate.
COMPLETE
The Complete window is where you finalize your estimate and mark it complete. Marking an estimate complete makes it so that you can no longer edit it. It also tells Xactimate that any estimates that you received as assignments are ready to be returned to the assignor.

To mark an estimate as complete,

1. From within an estimate, click the Complete tab.
   - By default, the Change Status window appears.
   - If any essential information is missing, the Required Information section displays the missing data. If there is no missing data, skip to step 5.

2. Select a link under the Required Information section and enter the missing information in its proper place within the estimate.

3. Click the Complete tab to return to the Complete window.

4. Repeat steps 2–3 until all required information has been filled in.

5. Click Change estimate status to Completed under Estimate Status.

6. Click Save from the Estimate menu to save your changes.
**REPORTS**

Xactimate allows you to print a number of reports reflecting data on the scope of the estimate or administrative claim information. You can also create and upload your own reports.

To print a report,

1. From within the estimate you want to print, click the **Estimate** menu and choose **Print**.

   By default, the **Estimate Reports** window appears.

2. Click the tab at the top of the window to choose the type of report you want to print.

   You can choose from **Estimate Reports**, **Claim Reports**, **Documents**, **Report Macros**, or **Uploaded Documents**. Most reports fall into the **Estimate Reports** or **Claim Reports** category. For more information on printing any of the other three types of reports, click the **Help** button on the **Estimate Reports** window.

3. To print an estimate report,
   
   a. Click the **Report drop-down button** at the top of the window and choose the report you want to print.
   
   b. Review all tabbed pages and select all the options you’d like to include on your report.

   You must mark the **Sketch** checkbox on the **Print Options** page if you want Xactimate to print your sketched floor plan. In addition, Xactimate will not activate the Images tab unless you already have some images attached to your estimate.

   c. Click **View** to see the report on your monitor, or click **Print** to send the report to your printer.

   To print a claim report,

   a. Click the report you want to print.

   b. Click **View** to see the report on your monitor, or click **Print** to send the report to your printer.
**Upload assignments**
Once you’ve finished estimating an assignment and marked it Complete, you’re ready to return it to the assignor. You do this by simply clicking the **Connect** tab from the Control Center main page. This delivers all SmartObjects (including completed assignments) in your XactAnalysis Communications *Inbox*. 
Introduction

Now that you've got Xactimate set up and ready to go, you'll need to understand how to create and scope an estimate. The following scenario should help you understand how the Claim Info, Sketch, Estimate Items, and Complete modules work together.
CREATING A NEW ESTIMATE

One of your insureds, Christina Travers of Orem, Utah, calls about a kitchen fire. This kitchen fire was quickly contained, but there is smoke and water damage to almost all rooms in the main floor of the house. Once you’ve completed the on-site scope (including all the needed dimensions), you are ready to enter the estimate in Xactimate.

To create the estimate in Xactimate,

1. Launch Xactimate and log in.
   The Xactimate Control Center Dashboard window appears.

2. Type Travers in the Open Project field, then click the Add New Project button.

   ![Xactimate Control Center Dashboard](image)

   Xactimate opens a new estimate with Claim Info selected and the Insured Info window in front.

3. In the Name field, type Christina Travers.

4. Leave Property as the address type and Home as the phone type, then type the following into the other fields in the Info section:
   - Street: 1234 N. Main
   - City/St/Zip: Orem/UT/84058
   - Number: 8015551234
   - E-mail: chtravers@email.com

   ![Insured Info Window](image)

5. Enter the appropriate dates in the Date of Loss, Date Received, Date Inspected, and Date Contacted fields.

   Date Entered is already added for you, as this date represents the date you added the estimate to Xactimate; e.g., today.
6. Click the **Claim Rep SmartList button**.

The **Claim Rep SmartList** appears.

*Note: If no claim reps have been entered previously, the Add Claim Rep window opens automatically and you can skip to step 7b, below.*

7. To add a claim rep to the SmartList,
   a. Click **Add**.
   The **Add Claim Rep window** appears.
   b. Fill in the fields as displayed below:

   ![Add Claim Rep Window](image)

   c. Click **OK**.
   The claim rep appears in the **Claim Rep SmartList**.

8. Highlight **Troy David** and click **OK**.

   Troy appears in both the **Claim Rep** field and the **Estimator** field.

9. Click the **Coverage/Loss** tab.

   The **Coverage/Loss window** appears.

10. Type **123457032** in the **Claim Number** field.
11. Type 32AF668346 in the Policy Number field.

12. Click the Type of Loss drop-down button and choose Fire.

13. Click the Cause of Loss drop-down button and choose Cooking.

14. Click the Parameters tab. The Parameters window appears.

15. Click the Price List SmartList button.

16. Choose Training and click OK. The Sales Tax Jurisdiction SmartList appears.

17. In the Add Ons section, type 10 in the Overhead field and 10 in the Profit field, then click the Cumulative O&P checkbox.


19. Type This estimate is valid for 30 days.

20. Highlight 30 and click the Bold button.

21. Click the File menu and choose Save, then click the File menu and choose Exit.

You have now created an estimate and entered the basic claim info information.
**Sketching the Floor Plan**

While you could use the *Estimate Items* module to scope the entire estimate, this tutorial will walk you through the steps for using Sketch to draw a floor plan.

The Travers floor plan

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**Sketching Bedroom 1**

To create the first bedroom,

1. Click the *Sketch* tab.

   The *Sketch* window appears, with the workspace taking up the main portion of the window.

2. If you don’t see an *N* icon with an arrow showing you north, you should turn on the legend. To do so,
   a. Click the *View* menu and choose *View Properties*.
      The *View Properties* window appears.
   b. Click the *Legend* checkbox.
   c. Click *OK*.

   An arrow displays the direction of north on your workspace now.

   *Note: Xactware recommends you start sketching your floor plans from the top left corner of the plan.*

3. Click the *Room button* and move your cursor over the workspace.

   You can see the outline of a 12’x12’ room appear.
4. Click and hold the left mouse button, then drag your cursor towards the southeast portion of the workspace until the room has inside dimensions of 16' 4" (east/west) by 15' 6" (north/south).

If you are having trouble getting the exact dimensions,

a. After you release the mouse button, click the east wall and drag it just enough to make the north/south wall dimensions appear.

b. Click the dimension of the north wall.

c. Type 16,4, then press Enter on your keyboard.

If you accidentally type 16.4 instead of 16,4, your dimensions will be wrong.

d. Click the south wall and drag it just enough to make the east/west wall dimensions appear.

e. Click the dimension of the west wall.

f. Type 15,6, then press Enter on your keyboard.

The room is now the exact dimensions you need.

5. Click the room to select it, then click the text Room1.

This allows you to change the name of the room without going into the Room Properties window.

6. Type Bedroom 1, then press Enter on your keyboard.

Next, you’ll add a closet to this bedroom, using the Square Break tool.

7. Press B on your keyboard.

This is the keyboard shortcut to the Square Break tool.

8. Move your cursor over the east wall.

9. Click the cursor at 7'7" (inside dimension) from the top of the room.
10. Move your cursor over the top part of the wall (where the closet will go), press and hold the Ctrl (Control) key on your keyboard, then click and drag the wall to the right (east) until the inside dimensions are 3'2".
   You can use the method described in step 4 to get the exact dimensions of the closet.

![Closet Sketch](image)

11. Right-click the text for Room2, then choose Properties from the right-click menu that appears.
   The Room Properties window appears.

12. Type Closet1 in the Name field.
   This is another way of changing the name of a room.

13. To make this closet a subroom of the bedroom, click the None next to Subgroup of, then click the drop-down button and choose Bedroom 1.

14. Click away from the Properties window.
   Note that the closet name now appears as Closet1 (1). The number in parenthesis indicates that this closet is a subroom of another room, and that this is the first subroom.
   Placing rooms as subrooms helps Xactimate calculate totals for you in a more logical way. This will be important when you start entering estimate items such as carpet.

**Sketching Bedroom 2**
Due to the orientation of Bedroom 2 to Bedroom 1, it will be easiest to start Bedroom 2 by sketching the closet. Note that while there are no dimensions listed for the closet in Bedroom 2, we can draw it easily because we can see how it fits next to Bedroom 1.

1. Click the bottom (south) wall of Closet1.

2. Press and hold the Control (Ctrl) key on your keyboard, then click and drag the south Closet1 wall until it is aligned with the south wall of Bedroom 1.

![Closet Sketch](image)

   If you forget to hold the Control key, this move will simply expand Closet1. If this happens, press Control Z (Undo) and try again.

3. Click the right (east) wall of Closet1.
4. Press and hold the Control key on your keyboard, then click and drag the east Closet1 wall until the inside dimension of the top (north) wall is 16'4".

   This is the only dimension we need for this room as we know the bottom wall matches the closet.

5. Click the bottom (south) wall of the room you just created and drag it down until it is aligned with the south wall in room you created in step 2.

6. Click within Room3 to select it, then click the room’s name and type Bedroom 2.

7. Right-click the text for Room2, then choose Properties.

   The Room Properties window appears.

8. Type Closet2 in the Name field.

9. Click the Subgroup Of drop-down button and choose Bedroom 2, then click away from the Room Properties window to close it.

10. Click the Estimate menu and choose Save to save your progress.

**Sketching the Floor Plan**

You can use the same method to add the kitchen and living room as you used for the second bedroom and closet.

1. Click the right (east) wall of Bedroom 2, then hold your Control key as you drag the east wall out until the inside dimensions are 18'6" on the inside. Release the Control key.

2. Click the bottom (south) wall of the kitchen, then drag it until the inside dimensions of the east wall are 19'8".

3. Right-click the Room2 text and choose Properties, type Kitchen in the Name field, then click away.

4. Click the bottom (south) wall of the kitchen, then hold your Control key as you drag the south wall until the inside dimensions of the east wall are 15'8".

   You must now draw the small offset that provides the entry for the exterior door.
5. Click the **Square Break button**.

6. Move the Square Break tool over the living room’s west wall until it is 4'4" from the south wall (based on interior dimensions), then click the left mouse button.

   The Square Break tool divides the wall.

7. Move the mouse over the lower section of this wall, then click and drag the wall westward until the living room offset is 4'4" wide.

8. Click twice on the living room’s label and rename it **Living Room**.

9. To add the garage, click the Room button and place the room to the right (east) of the Kitchen.

   This creates a room 19'8" square.

10. Click the east wall and drag it out until the room is 20' wide.

11. Click the Properties icon to see the Room Properties window.

12. **Type Garage** in the **Name** field, then press **Enter**.

   Once you press **Enter**, Xactimate changes the type of room from living to garage; this is because it recognizes that most rooms named **Garage** are probably of the **garage** type.
**STAIRS**

A simple staircase is easy to create in Sketch.

1. Click the **Staircase drop-down button** and choose **Regular**, then move your cursor over the Sketch workspace.

   The image of a staircase appears.

2. Move the staircase image so that it is just north of the living room offset and its north side aligns with the kitchen’s south wall.

   You may have to experiment with moving your mouse a bit to find the spot where Xactimate creates the correctly sized staircase.
3. Once the staircase image is placed correctly, click the left mouse button.
   Xactimate adds a staircase to the floor plan. Notice that Xactimate automatically removes the wall from the bottom of the stairs since stairs cannot be blocked by a wall.
   Before you finish the stairs, you need to begin part of the hall bathroom.

4. Press and hold the **Control** key on your keyboard, then drag the left (west) stair wall until it is 5'2".
   This creates the hall bathroom. We can now return to working on the stairs.

5. Move your cursor over the stairs (they will turn blue), then double-click the stairs.
   The **Staircase Properties** window appears.

6. Click the **Ceiling Type** field and click the drop-down button, then choose **Sloped**.
   Xactimate displays graphics that show the difference between the Box and Sloped ceilings.

---

**SKETCHING THE BATHROOMS**

So far, your sketch should look like this:

Now you can add the bathrooms.

1. Click the south wall for Room2 and drag it up (north) until the room’s inside north/south dimensions are 7'.

2. Double-click the room to see the **Room Properties** window, then type **Hall Bath** as the name and then select **Full Bath** as the type; click away from the Properties window, then click away from all rooms.
3. Press and hold the **Control** key on your keyboard, then drag the left (west) bathroom wall until it creates a new room 5'2" wide.

Since the master bathroom has the same dimensions as the hall bathroom, you won’t need to adjust the north/south walls.

4. Click twice on the room’s name and type **Master Bath**.

**SKETCHING THE MASTER BEDROOM**

You can now add the master bedroom to the plan. Start with the walk-in closet because you don’t need to refer to any dimensions to add it since it already matches other walls.

1. Click the south wall of the hall bathroom, hold your **Control** key, then drag the wall south until it is aligned with the south wall of the living room.

2. Click the left (west) wall of this new room and drag it west until it is aligned with the west wall of the master bathroom.

Now you can begin the master bedroom itself. Again, you need no new dimensions from the onsite scope because you know the west wall matches the west wall of the first bedroom, and the north wall matches the north wall of the master bathroom.

You can create a snap-line to help you align the master bedroom west wall to Bedroom 1’s west wall.

3. Click the **Snap-line button** 🔄, then move your cursor over the Sketch workspace.

You see vertical and horizontal snap lines appear where your cursor is. You don’t need the *horizontal* snap line for this estimate, so you should keep it low so it stays out of the way.
4. Move your cursor so that the vertical snap-line is centered on the west wall of Bedroom 1, then click the left-mouse button.

5. Press and hold the **Control** key, then click the west wall of the walk-in closet you just drew and drag it west until it snaps to the snap-line.

6. Click the upper (north) wall of the master bedroom and drag it north until it is aligned with the north wall of the master bathroom.

7. Click twice on the room name, then type **Master Bedroom** and press Enter on your keyboard.
8. Move the cursor into the unnamed room below the bathrooms and double-click.
   The Room Properties window appears.

9. Type **WICloset** in the Name field, then click the Type drop-down button and choose **Walk-in Closet**.

10. Click **Subgroup of**, then select **Master Bedroom** from the drop-down list. Click away from the Room Properties window to close it.

---

**Sketching the Linen Closet and Hall**

The linen closet is the next room in the estimate.

1. Press **B** (the shortcut for the Square Break button), then click the Bedroom 1 south wall 4' from the west wall.

2. Click and hold the **Control** key, then drag the west portion of the south wall down until it merges with the master bedroom wall.

3. Click the room, then click the Property icon to the top right of the room.
   The Room Properties window appears.

4. Type **Linens** in the Name field and select **Utility** in the type field; click away from the Properties window to close it.
The hall is the final room on this floor plan. Again, you don’t need any new dimensions—just fill the space between walls.

1. Click the east wall of the linen closet, hold your **Control** key, then drag the wall until you have filled the entire space between the linen closet and the kitchen.

2. Click twice on the room name text, then type **Hallway** and press **Enter**.

You have finished drawing the rooms on the floor plan.

3. Click the **Estimates** menu and choose **Save** to save the progress on your estimate.
MISSING WALLS
When you look at this complete floor plan, you can see that you need to remove some missing walls.

1. Click the Missing Wall button.
2. Move the cursor over the wall between the hall and the kitchen, then click the left mouse button. The wall disappears.
3. Press M on your keyboard to activate the Missing Wall tool. M is the Missing Wall keyboard shortcut.
4. Move your cursor over the north living room wall until it is 1' away from the southeast kitchen corner.
5. Click and hold the left mouse button, then drag the cursor left over the north living room wall until it reaches the hall missing wall.

   Note: You can left-click on the missing wall’s dimension and enter the correct length in the field that appears.

6. With the missing wall (between the kitchen and living room) highlighted, hold the Control key and press the right-arrow key on your keyboard until the missing wall is centered.

   Holding Control while pressing the arrow keys moves an item by 1" increments.

DOORS
To place the doors on this floor plan,

1. Click the Doorway drop-down button.
   An abbreviated list of door types and properties appears.

2. You need the default standard flush door, so click Standard, then move the cursor to the eastern portion of the Bedroom 1 south wall.
   When placing the doors, remember that doors are placed on center. In other words, if you place a door 10’ from the edge of a wall, the center of the door will appear 10’ from the wall.

3. Position the cursor 1'7" from the inside east bedroom wall, then click the left mouse button.
   Xactimate places a standard door with a right-hand swing into Bedroom 1. If you need to micro-adjust the placement of the door, you can use the same Control-arrow key method (page 69) that you used to move the missing wall between the living room and kitchen.

4. Click the door, then click the Properties button.
   This is simply another way of opening the Properties window.
5. Make sure the door width is 2'6", then click **Left-hand** by **Swing** to change the swing of the door from right-hand to left-hand.

6. Click away from the *Properties* window to close it.

Now you can place a door to the master bedroom.

7. Click and hold the **Control** key, then click the **Doorway button**. Move the cursor over the north wall of the **Master Bedroom** until the inside dimension is 1'8" from the bathroom wall, then click the left mouse button.

   This time, the swing and size of the door are correct, so you don’t need to make any further adjustments. Note that the **Doorway tool** is still loaded on your cursor. Holding the **Control** key while adding items to your floor plan allows you to add multiple copies of the same item.

8. Release the **Control key**, then move your cursor to the **Master Bathroom**’s west wall. Position the cursor 1'8" from its south wall (using inside dimensions), then click the left mouse button.

9. Click the dimensions of the door (2'6" appears by default), then type 2'4" in the space provided and press **Enter** on your keyboard.

   Xactimate changes the door’s width to match your specifications.

10. Press **D** on your keyboard (this is the keyboard shortcut for the **Doorway tool**), then add a door between the **Master Bedroom** and the **Walk-in Closet** 3'8" from the north wall (using inside dimensions).

11. Press **D** again, and add a door from the hall to the bathroom 1'2" from the east bathroom wall (using inside dimensions). With this door selected, open the **Doorway Properties** window and change the door to a 2'4" width with a left-hand swing.
12. Add a door to Bedroom 2, placing it on the south wall, 2'6" (inside dimensions) from its closet.
   You don’t need to change any defaults for this door.

CLOSET DOORS
The closet doors for Bedroom 1 and Bedroom 2 are bifold with mirrors.

1. Press D on your keyboard, then move the cursor over the wall between Bedroom 1 and Closet1 until it is 9" from the top (north) of the wall (using inside dimensions).
2. Click and drag the left mouse button until the door is 6' wide.
3. Make sure the door is selected, then click the Properties button. The Doorway Properties window appears.
4. Click the [+] to expand the Style section, then click the Door Type drop-down button and choose Bifold.
   The door Bedroom 2’s closet is exactly the same, so copy and paste this door, along with all its properties.
5. With the door highlighted, click the Edit menu, then choose Copy.
6. Click the Edit menu, then choose Paste.
7. Move the cursor over the wall that separates Bedroom 2 and Closet2 3'9" from the north closet wall (interior dimensions), then click the left mouse button.
   The bifold doors are pasted into the closet but the doors open in the wrong direction.
8. Make sure the bifold doors for Closet2 are selected, then click the Flip Horizontal button. This changes the closet doors to the correct direction.
**Exterior Doors**
You’re now ready to add exterior doors to the floor plan.

1. Press D on your keyboard, then position your cursor on the bottom (south) wall of the living room 1’6” from its offset’s west wall, then click and drag the door until it is 6’ wide.

   Sketch places a double-door on the living room’s south wall.

   **Note:** Unless otherwise indicated, Sketch assumes all doors between four and seven feet wide are double-doors.

   Next is the garage door.

2. Press D again, move the cursor 2’ from the west garage wall, then click and drag to create a 16’ door.

   Sketch places an overhead door on the garage’s south wall.

   **Note:** Unless otherwise indicated, Sketch assumes all doors between over seven feet wide are overhead doors.

3. Click the **Doorway drop-down button** and click **Sliding**.

4. Move your cursor over the north kitchen wall until it is 2’8” from the east (right) wall.

5. Click the left mouse button and drag the door along the wall until it is 5’ wide.

   Finally, you can add a simple 3’ exterior door between the kitchen and the garage.

6. Click the **Door drop-down button** and choose **Standard**.

7. Click the east kitchen wall at 4’, then drag the door until it is 3’ long.
8. Click **Flip Horizontal**.

This completes the entry of exterior doors for your floor plan.

![Floor plan with exterior doors entered.]

**WINDOWS**

It’s time to add exterior windows to this floor plan. Many of the windows in this home are the same type and same size, so you can easily enter those first.

1. Click the **Window drop-down button**.

   The **Window drop-down menu** appears.

   ![Window drop-down menu]

2. Click **Hung** (located just below Picture).

3. Position your cursor on the north wall of Bedroom 1 at 4'6" from the left (west) bedroom wall, then click the left mouse button.

   Xactimate places the window in Bedroom 1 with the center of the window at 4’6”.

   *Note: If necessary, you can use the Control-arrow key feature to adjust the location of the window on the wall.*

4. With the window still selected, click the **Properties button**.

   The **Window Properties** window appears.
5. Type 2'4" in the Base Height field, 4' in the Height field, 3'6" in the Width field; click away from the Properties window.

You can now copy this window and paste it everywhere the same window size is located.

6. With the window still selected, click the Edit menu, then choose Copy.

7. Click the Edit menu, then choose Paste.

8. Position the cursor along the north wall in Bedroom 1 11'6" from the west wall, then click the left mouse button.

Xactimate pastes a window at this location with the same properties as the first window.

9. Click the Edit menu, then choose Paste.

10. Position the cursor along the west wall in Bedroom 1 7" from the north wall, then click the left mouse button.

Xactimate pastes the same size and type of window at this location, even though the wall has a different orientation.

11. Click the Edit menu, then choose Paste.

12. Position the cursor along the north wall in Bedroom 2 at 4'6" from the west wall, then click the left mouse button.

13. Hold the Control key on your keyboard, then press V.

This is the keyboard shortcut for the Paste function.

14. Position the cursor along the north wall in Bedroom 2 at 11'10" from the west wall (using inside dimensions), then click the left mouse button.

Since the kitchen and living room have different windows, skip these for now and move to the master bedroom, which has three windows along the west wall and three windows along the south wall.

15. Press and hold the Control key on your keyboard, then click the Edit menu and choose Paste.

16. While holding the Control key, click the left mouse button on the west Master Bedroom wall to place a window at the following positions from the top (north) wall: 2'11", 7'10", and 12'9".

17. Hold the Control key again, and click the left mouse button on the south Master Bedroom wall to place a window at the following positions from the left (west) wall: 6', 11', and 16'.

Now to add two windows to the east wall of the living room. Although these windows don’t match the previous windows, you can still make adjustments to a pasted window.

18. Click Edit, choose Paste, then paste a window on the living room’s right (east) wall, 5’ from the north wall.

19. Click the lower red diamond of the window and drag it until the window is 4’ wide.

20. Select the window and click the Properties icon.

The Windows Properties window appears.

21. Type 2' in the Base Height field, then type 4'6" in the Height field. Click away to close the window.

22. Copy this window by (while the window is selected) clicking the Edit menu, then choosing Copy.
23. Press **CTRL-V**, then click the living room wall at 11’ from the north. You have one window in the kitchen.

24. Click the **Window drop-down button** and choose **Picture**.

25. Move the cursor over the north wall in the kitchen until you are 5'4” from the kitchen’s left (west) wall, then click the left mouse button.

26. With the window still selected, click the **Properties button**. The **Windows Properties** window appears.

27. Type **2'6”** in the **Width** field, **4’** in the **Base Height** field, and **2'6”** in the **Height** field. The last window that we need to add is a bay window located in the living room.

28. Click the **Window drop-down button** and choose **Bay**.

29. Press **Tab** on your keyboard four times until the window is facing south.
30. Position the window so that it is approximately centered on the living room's south wall.

![Floor Plan](image)

31. Click the left mouse button.

   Xactimate adds the bay window to the living room. The default bay window is 8'1" at the wide end.

32. Click the east wall of the bay window (make sure you grab the entire wall, not just the window itself—you may want to click the **Zoom In button** several times to clearly see your selections and dimensions) and drag it eastward until the wide end of the window is 9'.

   If extending the bay removes the east window from the bay,

   a. Click the west window of the bay and press **CTRL-C** (copy). Press **CTRL-V** (paste), then click the east bay wall.

      Xactimate adds a copy of the west window to the east side of the bay.

33. Highlight the south-facing window, then press **Control-right arrow** on your keyboard until it is centered.

![Floor Plan](image)

34. Click the **Estimates** menu and choose **Save** to save the progress on your estimate.
Reviewing the Sketch in 3D
At this point, you might want to review the sketch to see if there are any errors. Click the Zoom to Extents button to make sure you can see the entire floor plan at a glance. After that, click the 3D button to view the sketch in 3D.

By default, you click and drag your cursor on the Sketch workspace to view the sketch at different angles. You can also press Control-1, Control-2, etc (through Control-9) to view different angles of the sketch.

If you press Control-2 and then drag the cursor straight down, you may notice that Bedroom 2 does not have any windows added. We can add these windows directly into the sketch while in 3D. To do this,

1. Zoom in and adjust the angle so that you can see the north wall of Bedroom 2 clearly.
2. Click W (the Window tool keyboard shortcut) and move your cursor over the Bedroom 2 north wall.
   The image of a window appears, showing you the default dimensions of the window and where it sits on the wall.
   Note: Unlike adding windows and doors in the Plan view, placing windows in 3D does not place the window on-center.
3. Move the window so that it is 2'6" from the west wall and 2'6" from the floor.
   Xactimate places the window on the wall.
4. Click the Property icon for the window.
   The Properties window appears.
5. Enter 2'6" in the Base Height field and 3'6" as the width.
6. Click the Window Type drop-down button and choose Hung, then click away from the Properties window.
   Xactimate makes the changes to the window; you will be able to see the difference in window size immediately.
7. Repeat steps 2–7, placing this window 2'6" from Bedroom 2’s east wall instead of its west wall.

Now that you’ve added the windows to Bedroom 2, click Control-7 to view the home from the front right, then drag your cursor straight down and a little to the left, you may also notice that the linen closet is missing its door. As with windows, we can add the door directly from the 3D view.

1. Zoom in and angle the sketch so that you can see the wall between the hall and the linen closet clearly (you may need to come at it from a different angle).
2. Press D (the Door tool keyboard shortcut) and move your cursor to the linen closet wall.
3. Place the door in the center of the wall and click the left mouse button.
   You don’t need to worry about placing the door exactly flush against the floor; Xactimate assumes that most doors will be on the level and places them accordingly.
4. Click the Properties icon, then change the swing of the door to Left-hand.
   The next step cannot be done in 3D and must be done in the Plan view.
5. Click the Plan View button.
6. Click the Linens door and then click the **Flip Horizontal** button.
   This allows the door to swing out into the hall, rather than into the linen closet.

With the Bedroom 2 windows added and the linen closet door added, return to the 3D view to look around for any more problems. Press Control-7, then drag the cursor down slightly so you can see the living room and stairs. The stairs should actually have a wall underneath but no wall above. We’ll have to fix that in the Plan view.

1. Click the **Plan View** button.
   Xactimate returns to the floor plan of Sketch.

2. Click the east wall of the stairs, then click the **Properties** icon.
   The *Staircase Wall Properties* window appears.

3. Under *Dimensions*, click the **Wall Type drop-down button**.

4. Click **Missing Above Stairs**, then click away from the **Properties window**.

5. Click the **3D View** button again and adjust the angle so that you can see the staircase east wall.
   You will see that the wall is now missing above the stairs, and the under-staircase area is completely enclosed.
   The Sketch for this estimate is complete and you are ready to start adding line items.
**LINE ITEM ENTRY**

There are several ways you can enter estimate line items into our estimate. Understanding how each of these methods works helps makes estimating fast and easy. The line item entry method you use depends on your preference, and the size and type of your estimate.

**BEDROOM 1 LINE ITEMS**

For the first bedroom, we’ll start by using graphical estimation. Begin by cleaning the walls and ceiling in this room.

1. In the Search estimating pane, click **Search Price List - Training**.

2. In the Search field, type **CLNAV** and then click the **Search** button.

   Several line items appear that contain **CLNAV** as part of their codes.

3. Click **CLNAV Clean {V}**, then move your cursor over near the center of **Bedroom 1**.

   You can see the bedroom (including the **Closet1** subroom) highlighted.

   *Note: The Closet1 subroom will not be highlighted if you move your cursor directly over the text “Bedroom 1.”*
4. Click the left mouse button.
   Xactimate adds the proper amount of this line item to Bedroom 1.
   If you click the Select button and then double-click Bedroom 1 to open the Room Properties window, you will see an area in this window that displays a room’s variables.

   ![Room Properties - Bedroom 1](image)

   Xactimate tracks the numbers of any unit of measure required for each room; when you change the size of a room, Xactimate changes the variables as well, and the amount of the line item.

   **Note:** If you have any questions about how variables work, do a search on “Variables” in your real-time training pane.

Next we’ll estimate painting the walls and ceiling.

5. In the Search field, type PNTSP and then click the Search button.
   The price list item for painting appears.

6. Click PNTSP, then click within Bedroom 1.
   Make sure the entire bedroom and closet are highlighted before you click.

7. The next item is cleaning an average-grade light fixture, so we’ll type CLNLIT in the Search field and click Search.
   Since cleaning a light fixture doesn’t require any variables, the number of times you click within this room is the number of fixtures Xactimate assumes you want to clean.

8. Click CLNLIT, then click within Bedroom 1 once.
   Next is cleaning the windows in Bedroom 1.

9. Type CLNWD in the Search field, then click the Search button.
   Several window-cleaning line items appear.
10. Click CLNWD< (since these are smaller-than-average windows), then move your cursor over the Sketch workspace. Press the Spacebar.

The Add Line Item pad appears.

By default CLNWD< is a line item that cleans a single side of a window. But since you want to clean both sides of the window, a single usage of the line item isn’t enough.

11. Type 2 in the Calculation field, then click OK.

12. Click all three windows in Bedroom 1.

   Xactimate adds a total of 6 CLNWD< line items.

   Now we clean the door in Bedroom 1.

13. Type CLNDOR in the Search field and press Enter on your keyboard.

   After you’ve entered a code or description in the Search field, pressing Enter selects the Search button for you.

14. Click CLNDOR, then move your cursor over the Sketch workspace and press the Spacebar.

   Since a door has two sides to it, you need to make sure both sides get cleaned, the same way you did with the windows.

15. Type 2 in the Calculation field, then click OK.

16. Click the door in Bedroom 1.

   Xactimate adds two usages of CLNDOR to this bedroom.

   It requires a different line item to clean the bifold closet doors. You can also use the Search feature to search for the description of a line item.

17. Type clean and door in the Search field, then press Enter.

   A number of line items with the words clean and door in the description appear in the Search pane. You may have to scroll through the list to find CLNBF, which is cleaning a bifold door.

18. Click CLNBF, then move your cursor over the workspace, press the Spacebar, enter your own equation of 2, click OK, then click the closet door.

   This completes the scope for Bedroom 1. If you have entered all dimensions and line items correctly, your Item List should look similar to the graphic below when you select Bedroom 1.

   ![Item List Graphic]

   **Note:** If the square footage is off slightly, this could be due to the differences in defaults.
**BEDROOM 2 LINE ITEMS**
The scope in Bedroom 2 is almost identical to that of Bedroom 1. So instead of reentering all of the items, you can copy your scope. This must be done in Estimate Items.

1. Click the **Estimate Items** tab.
   
   If you still had *Bedroom 1* highlighted in Sketch, then it will be highlighted in the *Grouping* pane.

2. Click **Bedroom 2** in the *Grouping* pane.

3. Move your mouse cursor over the *Line Item List area*, then right-click your mouse.
   
The right-click menu appears.
4. Highlight Other Options (at the bottom of the right-click menu) and choose Retrieve Scope.
   The Room Selection window appears. Since Bedroom 1 is the only room that has any line items in it, that’s the only one you can select.

5. Click Bedroom 1, then click OK.
   Xactimate pastes all the items from Bedroom 1 into Bedroom 2.
   When variables are used to calculate a price-list item’s quantity, Xactimate automatically adjusts the quantity to fit the measurements of the new room. However, several items in this room were not calculated using variables. You have three windows in Bedroom 1 and only two in Bedroom 2, so you need to change the quantity of the clean windows line item from three to two.

6. Highlight CLNWD<.
   Information for this line item in this room appears on the Line Item Entry pad.

7. Type 4 in the Calc field, then click OK.
   Remember, you have to double the line items for each window, as each window has two sides to it.
   Bedroom 2 is now complete.

**LIVING ROOM AND STAIRS LINE ITEMS**

Our next room would normally be the kitchen, but since most of the damage was done to this room, we’ll skip it for now. The living room is next.

1. While still in Estimate Items, click Living Room in the Grouping pane.

2. Move your mouse cursor over the empty Item List area, then right-click your mouse. Highlight Other Options and choose Retrieve Scope.
   The Room Selection window appears. Note that this time, both Bedroom 1 and Bedroom 2 are selectable.

3. Click Bedroom 1, then click OK.
   The scope of Bedroom 1 appears in the living room. All items that used variables to calculate quantities have been automatically adjusted to match the living room’s dimensions.
   The living room has two light fixtures that need to be cleaned, so you’ll need to make that change.

4. Highlight CLN LIT, then type 2 in the Calc field. Click OK.
   Only two of the five windows in the living room are small, so you must take that fact into account.

5. Highlight CLN WD<.

6. Type 4 in the Calc field, then click OK.
   Remember, that’s two sides of two different windows.
   The highlight line in your Line Item List area should be blank now.

7. Type CLN into the Cat field, type WD into the Sel field, then type 6 into the Calc field. Click OK.
   Xactimate adds six instances of CLN WD to the estimate. This is a line item for cleaning average-sized windows.
   Next comes the living room exterior doors.
8. Click **CLN DOR**.
   This is a line item for cleaning interior doors. We don't have any interior doors in the living room, so we'll modify this line item.

9. Highlight **DOR** in the **Sel** field, then type **X**. Press **Tab** three times and type **4**. Press **Enter**.
   This changes the line item code from a regular interior door to 2 standard exterior doors.

10. Since there are no bifold doors to clean in the living room, click **CLN BF** and press **Delete** on your keyboard.
    To finish the living room and work on the stairs, let's return to Sketch.

11. Click the **Sketch** tab.

12. Type **FCCAV** in the **Search** field and press **Enter**, then click **FCCAV** and click in the living room.
    Make sure you stay near the center of the room; if you move too close to one of the walls, Xactimate thinks you are trying to add carpet to the highlighted wall(s).

13. With **FCCAV** still loaded, move your cursor over the center of the stairs, then press the **Spacebar** on your keyboard to change the activities.
    The **Add Line Item** pad appears.

14. Click the **Open Item Properties button** just to the right of the **Calculator** button.
    The **Item Properties Editor** appears.

15. Click the **Step Style** drop-down button and choose **Waterfall**.
    This adds an extra charge for the waterfall carpet installation.

16. Click **OK** in the **Item Properties Editor**, then click **OK** at the **Item Properties** window.

17. Click the left mouse-button near the center of the stairs.

18. Type **FCCPAD** in the **Search** field and press **Enter**, then click **FCCPAD** and click in the center of the living room and in the center of the stairs.
    This completes the line items for the living room.

19. Type **CLNAV** in the **Search** field and press **Enter**, then click **CLNAV**.

20. Move your cursor over a north corner of the stairs, so that only the walls are highlighted, then click the left mouse button.
    This instructs Xactimate to clean the walls surfaces above the staircase.

21. Search for and load **CLNLIT** onto your cursor, move the cursor over the stairs, then click the left mouse button.

22. Search for and load **CLNHR** onto your cursor, then move your mouse over the west wall of the stairs.
    Click the left mouse button for both the upper half and the lower half of the stairs.
    If you check your item list, the total quantity should be just over 11 linear feet.
23. Search for and load CLNBAL, then move your mouse over the east wall of the stairs. Click the left mouse button.

This completes the line items for the stairs.

24. Click the Estimates menu and choose Save to save the progress on your estimate.

    **Note:** If you find Xactimate is taking too long calculating the materials for your estimate, you can click the Toggle Calculations button so that Xactimate will not calculate your measurements after every change.

**MASTER BEDROOM LINE ITEMS**

Since the master bedroom is similar to the other bedrooms, it will be easiest to return to Estimate Items and use the Retrieve Scope feature.

1. Click the Estimate Items tab.

2. Click Master Bedroom in the Grouping pane.

3. Move your mouse cursor over the Item List area, then right-click your mouse and choose Retrieve Scope from the Other Options sub-menu.

There are now several rooms to choose from.

4. Click Bedroom 1, then click OK.

    The line items from Bedroom 1 appear in the master bedroom. Line items that use variables are automatically adjusted. Also, the walk-in closet is a subroom of the master bedroom, so the quantities include the closet.

5. As there are three light fixtures in the master bedroom (including one in the walk-in closet), click CLN LIT, enter 3 in the Calc field, then click OK.

    Next, there are six windows in the master bedroom and each window needs both sides cleaned.

6. Click CLN WD<, enter 12 in the Calc field, then click OK.

    There are two doors in the master bedroom, including the door into the walk-in closet.

7. Click CLN DOR, enter 4 in the Calc field, then click OK.

8. Since there are no bifold doors in the master bedroom, click CLN BF, then press the Delete key on your keyboard.
**HALL LINE ITEMS**
The hall line items are next.

1. Click the **Sketch** tab.
   
   Xactimate returns to Sketch.

2. Type **CLNAV** in the **Search** field then click the **Search** button; select **CLNAV** from the list below and then click the hall.
   
   Make sure “Wall Surfaces & Ceiling” is selected as the quantity before clicking.

3. Load **PNTSP** (seal then paint the walls) to your cursor (the same process you used in step 2 for **CLNAV**), then add it to the wall surfaces and ceiling of the hall.

4. Load **CLNLIT** (cleaning a light fixture) to your cursor, then click once in the west portion of the hall.
   
   The hall has two light fixtures, the but second one needs to be replaced rather than cleaned.

5. Load **LITAV** (adding a light fixture) to your cursor, then click once in the east end of the hall.

6. Load **FCCAV** (average-grade carpet) to your cursor, then click within the hall.
   
   Make sure you are placing the carpet on the floor, rather than on the walls.

7. Load **FCCPAD** (carpet pad) to your cursor, then click within the hall.
   
   Although you have doors in the hall, you only need to estimate cleaning one side of one door in this room. That’s because you are estimating the cleaning of both sides of those doors in the rooms the doors open into. (For example, the Bedroom 1 door opens into the bedroom rather than the hall, so you estimate cleaning both sides of that door when you estimated that room.) The door into the linen closet opens into the hall, so we’ll estimate that, but only one side is being estimated, since the other side is not being cleaned.

8. Load **CLNDOR** to your cursor, then click the door into Linens.
SCOPING BOTH BATHROOMS AT THE SAME TIME

1. Load CLNAV (clean walls and ceilings) onto your cursor, then click near the center of both bathrooms. Note that you don’t have to hold the Control key to add line items to multiple rooms, the way you must do with doors.

2. Load CLNBAR (clean the bathroom light bar) onto your cursor, then click near the center of both bathrooms.

3. Load CLNMIR (clean mirror) onto your cursor, then move the cursor over the Sketch workspace and press the Spacebar to change the quantity. The mirrors are three feet by three feet.

4. Type 9 (the square footage of a 3'x3' mirror) in the Calculation field and click OK.

5. Click within the master bath and the hall bathroom.

6. Load CLNSNK (clean the sink) onto your cursor, then click both bathrooms near the center of the room.

7. Load CLNVAN (clean vanity inside and out) onto your cursor, then move the cursor over the master bath. You will note that a vanity shape appears under your cursor on the Sketch floor plan.

8. Click the left mouse button so that the vanity is located in the south-east corner of the master bath.

9. Click the Zoom In button several times so that you can clearly see the dimensions of the vanity-cleaning line item, then click Select and drag the north end of the vanity until it is 3' long. You can also use the click-and-enter-dimensions method we learned on page 59.

10. Highlight the CLNVAN graphic you just adjusted, then click the Edit menu and choose Copy.

11. Press CTRL-V on your keyboard (this is the keyboard shortcut for Paste, as you learned in a previous lesson). The image of the vanity appears.
12. Position the vanity so that it appears in the south-west corner of the hall bathroom, then click the left mouse button.

It’s not a problem if you overlap some other line items.

13. Click the Zoom Out button until you can see the entire floor plan again.

   Note: You could also click the Zoom to Extents button to zoom to the entire floor plan and nothing else.

14. To clean the doors, load CLNDOR, then press the Spacebar and add your own equation of 2 to each bathroom.

15. Load CLNTLT (clean toilet) and add it once to both bathrooms.

16. Load CLNTUBSUR (clean tub and surround) and add it once to both bathrooms.

17. Type CLNF (clean floor, strip and wax) and add it to both bathrooms, making sure the quantity amount is listed as floor.

   You’ve now finished everything except the kitchen.

**Kitchen Line Items**

Time to scope the last room in the estimate: the kitchen. You can copy a few of the necessary line items from the living room.

1. Click the Estimate Items tab, then click Living Room in the Grouping pane.

2. Click the first item on the list—CLN AV—then hold Control on your keyboard and click the following line items: CLN LIT, CLN WD<, CLN X, PNT SP.

   Note: Holding Control while clicking allows you to select multiple line items.

   This highlights the five items.

3. Right-click on the highlighted items, then click Copy.

   This is simply a different way of copying items in Xactimate, the same as pressing CTRL-C or choosing Copy from the Edit menu.

4. Click Kitchen on the Grouping pane.
5. Click the **Edit** menu, then choose **Paste**.

All five line items are added to the kitchen.

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>63</td>
<td>CLN</td>
<td>AV</td>
<td>Clean the walls and ceiling</td>
<td>Dwelling</td>
</tr>
<tr>
<td>64</td>
<td>PINT</td>
<td>SP</td>
<td>Seal then paint the walls and ceiling (2 coats)</td>
<td>Dwelling</td>
</tr>
<tr>
<td>65</td>
<td>CLN</td>
<td>UT</td>
<td>Clean light fixture</td>
<td>Dwelling</td>
</tr>
<tr>
<td>66</td>
<td>CLN</td>
<td>VID</td>
<td>Clean unit per side 3 - 9 SF</td>
<td>Dwelling</td>
</tr>
<tr>
<td>67</td>
<td>CLN</td>
<td>X</td>
<td>Clean exterior door (per side)</td>
<td>Dwelling</td>
</tr>
</tbody>
</table>

6. Highlight **CLN LIT** and enter **4** in the **Calc** field. Click **OK**.

7. Click **CLN WD<** and enter **2** in the **Calc** field. Click **OK**.

8. Click **CLN X** and enter **2** in the **Calc** field. Click **OK**.

9. To clean the sliding patio door, type **CLN** in the **Cat** field and **PDOR** in the **Sel** field, type **2** in the **Calc** field, then press **Enter**.

   Now to work on the cabinets and countertop. All cabinetry needs to be replaced.

10. Click the **Sketch** tab.

    Xactimate returns to the Sketch workspace.

11. Zoom in to view the same detail you used when working on the vanity in the master bath.

12. Load **CABLOW**, then move your cursor to the upper left (northwest) corner of the kitchen. Click the left mouse button.

    Xactimate places a small reference block onto your floor plan.

13. With **CABLOW** still loaded on your cursor, press the **Tab** key on your keyboard four times, then move your cursor until the image of another cabinet is set immediately to the right (west) of the patio door.

14. Click the left mouse button.

    There should now be two cabinets placed at perpendicular angles to each other.

15. Click the **Select** button, then drag the south side of the first cabinet down until it is 15' long.

    If you have a hard time getting your dimensions exact, use the drag-and-type procedure explained on page 59 starting with step 4.

16. Click and drag the left (west) side of the second cabinet until it is 6' long.

    You're now ready to add the upper cabinets.

17. Load **CABUP**, then move your cursor to the upper left (northwest) corner of the kitchen (over the lower cabinet). Click the left mouse button.
18. With **CABUP** still loaded on your cursor, press the **Tab** key on your keyboard four times, then move your cursor until the image of another cabinet is perpendicular and flush against the first upper cabinet. Click the left mouse button.

19. Click the **Select** button 
    , then highlight the second upper cabinet you created and press **CTRL-C**.

20. Press **CTRL-V**.

    The image of another cabinet appears.

21. Place the cabinet immediately below the section of wall on the north side of the kitchen between the window and the patio door. Click the left mouse button.

22. Click the south side of the first upper cabinet you created (the one against the west wall), then drag it until it is 15' long.

    The second cabinet is already the length it needs to be.

23. Click the east side of the third upper cabinet you created and drag it until it is 4'3".

    The cabinet should fit the wall between the window and patio door perfectly.

24. Load **CABCTFL** (countertop), then move your cursor to the upper left (northwest) corner of the kitchen (over the upper and lower cabinet). Click the left mouse button.

25. With **CABCTFL** still loaded on your cursor, press the **Tab** key on your keyboard four times, then move your cursor until the image of another counter is perpendicular and flush against the first upper cabinet. Click the left mouse button.

26. Click the **Select** button 
    , then click the south side of the first countertop you created (the one against the west wall). Drag this countertop until it is 15' long.

27. Click the east side of the second countertop you created and drag it until it is 8'9".

    The counter should fit the wall between the first countertop and patio door perfectly.

    The next step is cleaning the sink and faucet. However, both need to be removed and reset when the countertop is replaced.

28. Load **CLNSNKDFA** and click onto the north counter between the window and patio door.

    This adds the cleaning line item to the estimate.
29. Load **PLMSNKD** and move onto the north counter on or near **CLNSNKDFA**. Press the **Spacebar** on your keyboard.

   This opens the *Add Line Item* pad, which allows you to adjust your activities as well as your quantities.

30. Click the Activity SmartList button, then click **Detach & Reset**. Click **OK** twice.

31. Click your left mouse button to add the line item to the countertop.

32. Repeat steps 29–31 for **PLMFAU** and place it over the sink.

   You now need to take care of a small hole in the drywall in the kitchen.

33. Load **DRYPATCH** and place it in the northeast corner of the kitchen.

34. To remove and replace the buckled underlayment, load **FCVUL1/2** and place it on the kitchen floor.

35. To replace the vinyl kitchen floor, load **FCVAV** and move it over the kitchen floor, then press the **Spacebar** on your keyboard.

   You do not need to have the vinyl floor removed since it will be torn up with the underlayment.

36. Click the Activity SmartList button, then select Replace. Click **OK** twice.

37. Left-click on the kitchen floor.

38. If you have not returned to a normal-sized view of your floor plan already, click the **Zoom to Extents** button 🗺️.

   If you clicked the **Toggle Calculations** button, click it again to turn the calculations back on.

39. Click the **Estimates** menu and choose **Save** to save the progress on your estimate.
**USING SUMMARY**
At this point, the estimate looks complete. However, you need to include carpet cleaning for several rooms in the estimate. While you could add this line item in Sketch or Estimate Items, for this estimate we'll do this in the Summary List.

1. Click the **Estimate Items** tab.

2. Click to highlight **Bedroom 1**, **Bedroom 2**, and **Mstr Bedroom**.
   You can see that, once these items are selected, their line items appear in the Summary List.

   ![Image of Estimate Items tab selected]

3. Click **Search Price List - Training** in the **Search** window.
   This works the same way as the **Search** pane in Sketch does.

4. Type **clean** and **carpet** in the **Search** field, then click the **Search** button.
   A list of line items appears.

   ![Image of Search for carpet cleaning]

   ![Image of Summary List with carpet cleaning line items]
5. Double-click **CLNFCC**.

Xactimate adds the carpet-cleaning line item to all selected rooms.

6. In the *Grouping* pane, click **Hall Bath**, hold the *Control* key, then click **Master Bath**.

7. In the *Search* field, type **clean bath accessories**, then click **Search**.

8. Double-click **CLNBAC**.

   This adds **CLNBAC** to both bathrooms.

9. Enter 3 in the *Calc* field.

   This accounts for cleaning the toilet paper holder, the towel holder, and wash cloth holder in each bathroom.

The estimate’s line items have all been added. You should save your changes now.
COMPLETING THE ESTIMATE

Your estimate now looks complete and ready to print. We can check the Sketch floor plan for errors.

1. Click the Sketch tab.

2. Click the Inspect Level button.

   If everything has gone as expected, Xactimate will inform you that no inspection issues were found on the level.

3. Click OK.

4. Click the Complete tab.

   If you have missed any critical information in the Claim Info pages, Xactimate would let you know here. In this case, we forgot to enter a policy number.

5. Click The policy number is empty link.

   Xactimate returns to the Claim Info Coverage/Loss window.

6. Type 987654123 in the Policy Number field, then click the Complete tab again.

   If you followed the instructions in this tutorial correctly, there should be no other warnings. If there are, click the link and fill in the proper fields.

7. Click Change estimate status to Completed.

   The Log Information for Kitchen window appears, informing you that there is a problem in the kitchen with resetting the sink.

8. Double-click the error.

   The Modify Items window appears, explaining the issue with the faucet. Since you are detaching and resetting the sink, you do not have to detach and reset the faucet additionally.

9. Highlight PLM FAU and click the Delete button, then click Yes to confirm the deletion.

10. Click OK when Xactimate tells you there are no more items in violation of this rule, then click OK again when Xactimate tells you that you have corrected all violations.

11. Click Yes to re-sequence your line numbers.

    Doing this simply renumbers the line items in the estimate so that they are listed numerically based on the room they are in, and the order within the room.

    Now that you have corrected all errors, you can print.

12. Click Print.

    The Estimate Reports window appears.

13. Click the Report drop-down button and choose Scope.

14. Click the Sketch checkbox in the Print Selection area (to print the Sketch floor plan), then click View.

    Xactimate displays the Scope report to your monitor. From here, you can review the report or print it out for your customers to see.
Xactimate Version 27 Training Options

**TRAINING**

Xactware offers you a number of other valuable training options you can use to learn Xactimate version 27.

- **Classroom Training**
  
  Xactware’s training department conducts training throughout the year at convenient locations across North America. Skilled presenters give students hands-on training for with beginning to advanced courses. Students compile actual estimates and learn the tips and tricks that can make their estimating much faster.

- **Virtual Classroom Training**
  
  Attend an online training session with an Xactware professional without ever leaving your office. Xactware’s online training allows you to ask questions, see instruction on your computer, and interact with the instructor and other students.

- **Self-Paced Training**
  
  Our self-paced training is ready to go whenever and wherever you are. Self-paced training combines video, animation, instructor narration, and more to offer you a variety of convenient, self-contained courses.

- **eLearning Library**
  
  Xactware’s eLearning Library comes in self-contained modules that can be organized in a wide variety of ways or combined with your existing training in your learning management system.

- **Certification**
  
  Xactware Certification is one of the best ways to determine whether a user has the experience and knowledge to get the job done right. This program has rigorous training and testing requirements for each certification type. You can trust that those certified by Xactware are the best in the business. Whether your goal is to become certified as a user or a trainer, completing this program places you in an elite group of Xactware professionals.

For additional information on signing up or purchasing these training courses, see our website at [www.xactware.com/training](http://www.xactware.com/training).
INTRODUCTION
The following chapter walks you through a number of procedures you may have questions about in Xactimate version 27.

You can research topics on the following:

- Assembly Wizard (page 97)
- Claim Info (page 102)
- Complete window (page 107)
- Control Center (page 114)
- Estimate Items (page 138)
- Price Lists (page 160)
- Report Editor (page 192)
- Sketch (page 200)
- Third-party (page 224)
- XactAnalysis (page 235)
- Calculation Wizards (page 101)
- Company Header (page 105)
- Contact Manager (page 112)
- Data Transfer (page 125)
- Estimates (page 157)
- Projects (page 184)
- Reports (page 198)
- System Setup (page 222)
- Using SmartLists (page 233)
ASSEMBLY WIZARD
The section on assembly wizards walks you through the following topics:

**To run the Drywall assembly wizard**
To run the Drywall Assembly wizard estimates the amount of drywall needed for a set of walls. You will need to enter the shape and dimensions of the walls to be covered as well as the thickness and finish of the drywall on these walls.

To run the Drywall Assembly wizard,
1. Click the Estimate Items tab from within an estimate.
2. Highlight the room/level/grouping item you want to run the Drywall Assembly wizard on.
3. Highlight an empty line in the Line Item workspace.
4. Choose Assembly from the Tools menu.
5. Highlight Drywall and click OK.
   The Wall Information for Wall 1 window appears.
6. Enter the type and dimensions of a wall, then select the drywall thickness and drywall preparation for this room.
7. Click OK.
   The Drywall Assembly wizard appears, displaying the square feet of drywall necessary for the chosen wall.
8. Click Add and repeat steps 6–7 until all walls within the selected area have been accounted for.
9. Click OK.
   The blue text of the wizard appears as a line item for the selected room(s).

**To run the Floor Framing assembly wizard**
The Floor Framing Assembly wizard calculates the amount of flooring for rectangular, trapezoidal, and triangular floor shapes. The Flooring material calculated includes the number of floor joists and the square feet of sheathing and/or underlayment. These items are calculated based on the dimensions of the floor sections.

To complete this wizard, you will need to know the number of supporting walls, if any, and the width of any stairwells passing through each floor section.

To run the Floor Framing Assembly wizard,
1. Click the Estimate Items tab from within an estimate.
2. Highlight the room/level/grouping item you want to run the Floor Framing wizard on.

3. Highlight an empty line in the Line Item workspace.

4. Choose Assembly from the Tools menu.

5. Highlight Floor Framing and click OK.
   
   The Floor Framing Assembly wizard appears.
   
   **Note:** if the Floor Area Information for Section 1 window appears, skip to step 7.

6. If the Floor Area Information for Section 1 window does not appear, click Add.

7. Enter the name and shape of the floor section, then enter the joist system information, including length, width, and size of the joists themselves.

8. Enter the number of supporting walls this floor section contains, as well as the number of stairwells that run through it.

9. Select the sheathing material used for this section, and the type of amount of underlayment.

10. Click OK.

   The Floor Framing Assembly Wizard appears, displaying the dimensions of the selection, as well as the types of joists, sheathing, and underlayment.

11. Repeat steps 6–9 until all floor sections within the selected area have been accounted for.

12. Click OK.

   The blue text of the wizard appears as several line items for the selected room(s).

**TO RUN THE FOUNDATION ASSEMBLY WIZARD**

The Foundation Assembly wizard allows the user to calculate the material needed for either a concrete, masonry, or wood foundation wall. You will need to enter appropriate dimensions for the different foundation types and shapes.

**Note:** If identical foundation walls exist, you can either enter each foundation wall separately; combine the walls' lengths and enter that amount in the length field; or enter the appropriate number in the number field. If the foundation walls are the same height and thickness, but different lengths, you can combine their lengths and enter that information in the length field.

To run the Foundation Assembly wizard,

1. Click the Estimate Items tab from within an estimate.

2. Highlight the room/level/grouping item you want to run the Foundation Assembly wizard on.

3. Highlight an empty line in the Line Item workspace.

4. Choose Assembly from the Tools menu.

5. Highlight Foundation and click OK.

   The Foundation Assembly wizard appears with Foundation Information for Foundation 1 in front.
6. Type a name for the foundation and select a type of foundation and the foundation material, as well as the foundation shape.

7. Enter the length, width (thickness), and height of the foundation wall.

8. Enter the number of foundation walls that match these same coordinates.

9. Click **OK**.

   The *Foundation Assembly wizard* appears, displaying the dimensions of the foundation wall(s), as well as the type, material, shape, and size of the wall(s).

10. Click **Add** repeat steps 6–9 until all foundation walls within the selected area have been accounted for.

11. Click **OK**.

   The blue text of the wizard appears as several line items for the selected room(s).

**TO RUN THE FRAMED WALL ASSEMBLY WIZARD**

The Framed Wall Assembly wizard calculates the board feet in one or more stud walls. Included are the studs, bottom and top plate(s), two and one half studs for each corner, opening, or wall intersection, and material for the header(s) if any.

You must enter the dimensions of each wall, the size and spacing of the studs, the size of openings, and the opening’s header material size.

To run the Framed Wall Assembly wizard,

1. Click the **Estimate Items** tab from within an estimate.

2. Highlight the room/level/grouping item you want to run the Framed Wall Assembly wizard on.

3. Highlight an empty line in the Line Item workspace.

4. Choose **Assembly** from the **Tools** menu.

5. Highlight **Framed Wall** and click **OK**.

   The *Framed Wall Information for Wall 1* window appears.

6. Type a name for the wall and select a the walls location, shape, and whether or not the wall is a bearing wall.

7. Enter the number of corners and/or intersecting walls to this wall.

8. Select the lumber type used for the construction on this wall.

9. Enter all the dimensions for this wall.

10. Enter the stud size for the wall, and enter the number of top plates.

11. If there are any openings in this wall,

    a. Click **Add**.

       The *Opening Information* window appears.

    b. Enter the number and type of openings in this wall that have the same specifications (size, headers, type, etc.).
c. Enter the dimensions of the wall opening.

d. Enter the size of the header for the opening as well as the number of pieces.

e. Click OK.

The dimensions of the wall opening are displayed in the lower sub-window.

f. Repeat these steps for each unique type of wall opening in the wall.

12. Click OK from the Framed Wall Information for Wall 1 window.

The Framed Wall Assembly wizard appears, displaying the kind, dimensions, and shape of the framed wall.

13. Click Add and repeat steps 6–12 until all framed walls within the selected area have been accounted for.

14. Click OK. The blue text of the wizard appears as several line items for the selected room(s).

**TO RUN THE ROOFING ASSEMBLY WIZARD**

The Roofing Assembly wizard calculates the amount of roofing materials needed for the following roof shapes; gable, hip, flat or sloped rectangular, flat or sloped trapezoidal, and flat or sloped triangular roofs or sections. Roofing materials include composition shingles, tile, wood, and single or multi-ply membranes. The three roofing activity choices are remove, replace, or remove & replace.

A waste percentage may be entered for replacement quantities for each roof section. A separate waste item is added for each type of roofing material entered in the wizard. Waste is not added for removal quantity.

1. Click the Estimate Items tab from within an estimate.

2. Highlight the room/level/grouping item you want to run the Roofing Assembly wizard on.

3. Highlight an empty line in the Line Item workspace.

4. Choose Assembly from the Tools menu.

5. Highlight Roofing and click OK.

The Roofing Information for Section 1 window appears.

6. Type a name for the roofing section and select a roof slope, shape, and activity.

7. Enter the anticipated waste percentage.

8. Enter the covering type and roofing material.

9. Enter the length and width of this roofing section.

10. Click OK.

The Roofing Assembly wizard appears, displaying the dimensions of the roofing sections, as well as the shape, slope, activity, material type, and waste of the roofing section.

11. Click Add and repeat steps 6–9 until all roofing selections within the selected area have been accounted for.

12. Click OK.
CALCULATION WIZARDS

TO USE CALCULATION WIZARDS
Calculation wizards are formulas that help you figure out quantities for complex line items, such as figuring out cubic yards of concrete, squares of roofing, etc. You can see a complete list of calculation wizards by clicking the Formulas button on the Calculator.

To use calculation wizards,

1. From within an estimate, click the Estimate Items tab.
2. In the Grouping pane, highlight the grouping item you are applying this line item to.
3. From the Line Item Entry window, enter the category and selector codes for the line item you are adding to your estimate into the Line Item Entry pad.
   Xactimate automatically fills in the rest of the fields with the default information, which you can change as necessary.

   Note: Certain line items will enter a calculation formula directly into the Calc field. If Xactimate has entered the calculation formula you want to use into the Calc field, click OK and skip to step 7.

4. Click the Calculator button next to the Calc field.
   The Calculator appears.

   Note: If Xactimate entered a calculation formula you don’t want to use into the Calc field, click No to bring up the Calculator.

5. Click the Formulas button.
   The Formula List appears.

6. Highlight the formula you want to use to calculate this line item and click OK.
   The window for the formula you selected appears.

7. Fill in all applicable fields in the window, then click OK.
   Xactimate returns to the Line Item Entry pad, with the calculation formula entered into the Calc field.

8. Make any further changes to the line item in the Line Item Entry pad, then click OK.
   The line item is added to your scope, correctly calculated.
**CLAIM INFO**

The Claim Info section instructs you on the following topics:

| ▲ To change an estimate’s default activity setting (page 102) | ▲ To change an estimate’s default repaired by setting (page 102) |
| ▲ To change the Labor Efficiencies setting (page 102) | ▲ To customize a model opening statement for an estimate (page 102) |
| ▲ To enter a permit amount (page 103) | ▲ To filter an estimate’s price list (page 103) |
| ▲ To re-order line item numbers (page 104) | ▲ To select a model statement for an estimate (page 104) |
| ▲ To select a new price list for your project (page 104) | ▲ To view the labor burden taxes (page 104) |

**TO CHANGE AN ESTIMATE’S DEFAULT ACTIVITY SETTING**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. **a.** In the **Activity (Default)** area, click the **Use price list defaults** radio button to default to the most commonly used price list activities, such as &, Remove and Replace, for some price list items.

   **OR**

   **b.** Click the Select radio button and set the default activity to the activity you want to use for most items.

**TO CHANGE AN ESTIMATE’S DEFAULT REPAIRED BY SETTING**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. In the **Repaired By** area under **Pricing**, select **Contractor** or **Homeowner**.

   The new default setting is accepted for future line items.

**TO CHANGE THE LABOR EFFICIENCIES SETTING**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. In the **Pricing** area, click the **Labor Efficiency drop-down button**.

3. Click one of the options that appear.

   Your new labor efficiency is saved.

**TO CUSTOMIZE A MODEL OPENING STATEMENT FOR AN ESTIMATE**

You can often save time by using a model opening statement as a template, rather than creating a new statement for each estimate.

1. Click the **Claim Info** tab within an estimate, then click **Parameters**.

2. In the **Report Text** area of the Parameters window, click the **Model** button.

   The **Model Opening Statement SmartList** appears.
3. Highlight the opening statement you want to use as a template and click **OK**.
   The text of the template opening statement appears in the *Opening Statement* field.

4. Click the **Edit** button.
   The Opening Statement editor appears.

5. Edit the text of your statement.

6. When you’re finished, click **File**, then choose **Exit**, and answer **Yes** to save changes.

See also:
“[To create a model opening statement](#)” on page 116

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**To Enter a Permit Amount**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. In the *Add Ons* area, click the **Additional Charges** button.
   The *Additional Charges* window appears.

3. Enter a definition (such as *Permit*) in the *Definition* field.

4. Click the **Calculation Type** drop-down to select how you want the charge figured.

5. Click the amount or rate of the permit.

6. Select any coverage, items, tax type, and O&P that might be applied to this permit, as well as a maximum amount (in the case of percentages).

7. Click **OK**.

**To Filter an Estimate’s Price List**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. In the *Pricing* area, click the **Price List Filter SmartList button**.
   The *Price List Filter SmartList* appears. If you have already created the filter you want to use, skip to **step 7**.

3. Click **Add**.
   The *Price List Filter Editor* appears.

4. Click the **View drop-down button** to choose to view the list by division or category.
   Xactimate modifies the window to fit the view you selected.

5. Place a checkmark next to each category/division you want included in your estimate.
   You can include portions of a category/division by clicking the [+] next to each and placing a checkmark next to the portion you want to include. Click the [+] again to filter out actual line items.

6. Type a name for this filter in the **Filter Name** field, then click **OK** to return to the *Price List Filter SmartList*. 
7. Highlight the filter you want to use for this estimate, then click **OK**.

Price list items that you haven’t specifically selected for this estimate are filtered out.

**TO RE-ORDER LINE ITEM NUMBERS**

To re-order the line item numbers in an estimate,

1. From the estimate you are re-ordering, click the **Estimate Items** tab.

2. Order the rooms and line items so that they are ordered the way you want them to be numbered.
   
   You can do this by dragging line items around on the **Item List**, and by dragging rooms around on the **Grouping** pane.

3. Click the **Tools** menu, then click **Resequence Line Numbers**.
   
   Xactimate re-orders the line items, beginning with the line items at the top of the first room and continuing through the last line items at the bottom of the last room.

**TO SELECT A MODEL STATEMENT FOR AN ESTIMATE**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. Click the **Model** button for **Opening** or **Closing** (depending on whether you want the statement to come at the beginning or the end of the report) in the **Report Text** area at the bottom of the window.
   
   The **Model Statement SmartList** appears.

3. Select the model statement you want to use for this estimate and click **OK**.
   
   You can now customize the model statement (page 102) or use it as-is.

**TO SELECT A NEW PRICE LIST FOR YOUR PROJECT**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. In the **Pricing** area, click the **Price List SmartList button**.
   
   The **Price List SmartList** appears.

3. Highlight the desired price list and click **OK**.

**TO VIEW THE LABOR BURDEN TAXES**

1. From within an estimate, click the **Claim Info** tab, then click **Parameters**.

2. In the **Add Ons** area, click the **Labor Burdens button**.
   
   The **Labor Burden Taxes** window appears. You can view tax rates, but not change them here. You can change labor burden taxes from the **Price List Editor**.

See also:

“**To add a labor burden tax**” on page 164

“**To delete a labor burden tax**” on page 171

“**To edit a labor burden tax**” on page 177
COMPANY HEADER
The Company Header section displays the following topics on company headers:

| ▲ To add a company header to an Estimate (page 105) | ▲ To create a company header (page 105) |
| ▲ To duplicate a company header (page 106) | ▲ To set up a company header as default (page 106) |

TO ADD A COMPANY HEADER TO AN ESTIMATE

1. Open the estimate.

2. Click the Claim Info tab, then click the Parameters tab from within the Claim Info window.

3. In the Report Text section of the Parameters window, click the Company Header SmartList button.

   The Company Header SmartList appears.

4. Highlight the company header you want added to this estimate.

   Click here if you need help creating a company header.

5. Click OK.

   The cover page for this estimate will now display the company header you’ve added to the estimate.

See also:
“To create a company header” on page 105
“To duplicate a company header” on page 106

TO CREATE A COMPANY HEADER

1. From the Control Center main page, click Document Modules.

   The Company Header SmartList appears in the upper half of the window.

2. Click Add.

   The Add Company Header Information window appears.

3. Enter the header name, company name, and company info as you want it to appear at the top of your cover sheet.

4. If you are adding a graphic image to the company header, click Import.

   The Select Image File window appears.

5. Browse to highlight the .jpg file you want to add to the company header, then click Open.

6. Click OK to return to the Company Header SmartList.
TO DUPLICATE A COMPANY HEADER

1. From the Control Center main page, click Document Modules. The Company Header SmartList appears in the upper half of the window.

2. Highlight the company header you want to duplicate, then click Options and choose Duplicate. Xactimate creates a copy of the highlighted estimate in the Company Header SmartList.

3. Highlight the copied company header and click Edit.

4. Modify the header name, company name, and company info as you want it to appear at the top of your cover sheet.

5. Select a new graphic by clicking Import and selecting a new .jpg file, then clicking Open.

6. After you’ve made sure the new company header information is correct, click OK to return to the Company Header SmartList.

TO SET UP A COMPANY HEADER AS DEFAULT
You can set up Xactimate so that one specific company header is entered by default into all projects created.

1. From the Control Center main page, click System Settings. The System Settings Info page appears.

2. In the navigation tree to the left, click Defaults under Project. The Project Defaults page appears.

3. In the Administrative Defaults section, click the Company Header drop-down button, then select the company header you want to use as default.

4. Click Yes when Xactimate asks if you want to save the changes.

You can also set up a default company for only yourself by following these steps from the User Preferences Project Defaults page instead of the System Settings Project Defaults page. Any defaults set up in User Preferences will override defaults set up in System Settings.

You can override both User Preferences and System Settings defaults within any estimate.
**COMPLETE WINDOW**
The Complete window section covers the following four topics:

<table>
<thead>
<tr>
<th>▲ To add supplemental items (page 107)</th>
<th>▲ To change the status of an estimate (page 107)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲ To create a work order (page 108)</td>
<td>▲ To print a blank work order (page 109)</td>
</tr>
<tr>
<td>▲ To send a referral assignment (page 109)</td>
<td>▲ To use the Payment Tracker (page 110)</td>
</tr>
<tr>
<td>▲ To void a payment (page 111)</td>
<td></td>
</tr>
</tbody>
</table>

**TO ADD SUPPLEMENTAL ITEMS**
If you have created an estimate, made only ACV payments on it, then need to add new line items to the estimate, you have the option of tracking these supplemental items separately from the original estimate.

1. Return to the estimate and change the status to **In Progress**.
   
   The *Supplement or Correction* window appears.

2. If prompted, click the **Supplement Estimate** radio button, then click **OK**.

3. Click **Yes** to confirm that you don't want to make any additional changes to the original estimate.

4. Add the new line items to the estimate.

5. Change the status to **Completed**.

6. Click the **Payment Tracker** tab to return to the Payment Tracker.

You will now see **S1** in the *Sup* column at the beginning of the new line items. You can continue working with the Payment Tracker for these new items.

Additional supplemental items are marked as **S2**, **S3**, etc.

*Note: This feature is not available in all profiles.*

**TO CHANGE THE STATUS OF AN ESTIMATE**

1. From within an estimate, click the **Complete** tab.
   
   By default, the *Estimate Status* window appears.

   If you want to mark your estimate as **Complete** and any essential information is missing, the *Required Information* section displays the missing data. If there is no missing data or you are marking your estimate as **In Progress**, skip to **step 5**.

2. Select a link under the *Required Information* section and enter the missing information in its proper place within the estimate.

3. Click the **Complete** tab.

4. Repeat **steps 2–3** until all required information has been filled in.

5. In the **Complete** window, choose **In Progress** or **Complete** under *Estimate Status*.

6. Click **Save** from the *Estimate* menu to save your changes.
TO CREATE A WORK ORDER

1. Open the estimate you want to print a work order for.

2. Click the **Complete** tab, then click **Work Order** in the upper-right corner of the window.
   The Work Order SmartList appears.
   
   *Note: If no other work orders exist for this estimate, the Work Order Name window appears instead of the SmartList; skip to step 4.*

3. Click the **Add** button from the Work Order SmartList.
   The Work Order Name window appears.

4. Type the work order name into the field provided, then click **OK**.
   The Work Order window appears.

5. At the top of the Job Info page, click the **Company SmartList button**.
   The Contractor SmartList appears. If there are no contractors in the SmartList, the Add Contractor window appears as well. Add the required information to the Add Contractor window and click **OK** to return to the Contractor SmartList.

6. Select a contractor from the Contractor SmartList and click **OK**.
   You are returned to the Job Info page.

7. Complete the remaining items on the Job Info page.
   You can add job instructions, if needed, using the built-in word processor at the bottom of the window.

8. Click the **Next** button to move to the Item Filter page.
   This is where you specify which categories or trades to include in this work order.

9. When finished with the Item Filter page, click the **Next** button to go to the Notes page.

10. In the Notes page, you can save category notes and room notes so that the same library of notes is available for any work order.
    When you highlight a category in the Category Notes page, a corresponding category note appears in the field on the lower portion of the window.

11. Click the **Next** button to move to the Item List page.

12. Make any final adjustments to the prices for the items that make up your work order and click **Next**.
    The Print page lets you specify how you want your work order to appear.

13. When you have completed all the information in the Print page, click **View** to preview what your work order will look like, or **Print** to send it to your printer.

14. Click **Close** when finished.
TO PRINT A BLANK WORK ORDER
You can print work orders for an estimate without including any pricing information in it. You can do this by creating an estimate and then printing a blank work order from the Projects SmartList.

1. After creating your estimate, return to the Control Center and click the Projects tab.
2. Highlight your estimate.
3. Click on Options and choose Print Blank Work Order.
4. To print all of the rooms in your estimate, click the All radio button, or click the Rooms radio button and then click the SmartList button to choose only specific rooms.
5. Select the categories you want to include in the report by checking the box next to each category.
6. Click the correct checkbox to indicate whether you want to include contractor items and/or homeowner items.
7. In the Division Breakdown section, select all the options by clicking the All checkbox, or de-select the All checkbox and select only the options you want to appear on the report.
8. When you have made the appropriate selections, you can view your report by clicking the View button or you can print the blank work order by clicking the Print button.

TO SEND A REFERRAL ASSIGNMENT
To send a referral assignment,

1. From the Control Center main page, download an assignment from XactAnalysis (page 236), then scope it.
2. Click the Complete tab.
3. Click the Change estimate status to Completed link.
   At this point, if you do not see the Send a Referral Assignment link,
   a. return to the Xactimate Control Center Dashboard window and connect to XactNet.
      You should see your referral rules appear in the XactNet Connection window.
   b. Highlight the referral rules in the XactNet Communications pane and click Accept.
4. Click the Send a Referral Assignment link.
   The Referral Assignment window appears.
5. Select the organization/company you are referring this assignment to by choosing it from the Receiver drop-down button.
   If you don’t want to send this referral the entire estimate, filter out any coverage types or categories by clicking the Select button and choosing only the coverages or categories you want to send.
6. Click Append Estimate Notes only if you want to include the notes that were sent with this assignment from XactAnalysis.
7. Type any additional notes in the Note/Instructions for Referral Assignment field.
8. Click **View** to see a copy of the report that the referral organization will see.
   Click the **close** button to return to the **Referral Assignment** window.

9. Click **Send**.
   Xactimate packages the assignment into a SmartObject and asks if you want to send this assignment to a different organization.

10. Click **Yes** or **No**.
    If you click **No**, skip to **step 13**.

11. Repeat **steps 5–9** for each organization you want to send this referral assignment to.

12. Click **Save & Exit**.

13. Return to the Control Center **Dashboard** window and choose **Outbox** from the upper **XactNet Communications** drop-down list.
   You should see the referral(s) in this window pane.

14. Click **Connect**.
    Xactimate sends the referrals to XactAnalysis, where they will be sent on to the referred organization.

**TO USE THE PAYMENT TRACKER**

The Payment Tracker allows you to track the ACV (actual cash value) and RC (replacement cost) payments you make to the insured. The process you use to run the Payment Tracker works as follows:

1. Create an estimate. Enter all pertinent information, including Sketch (or Grouping and Dimensioning) and line items.

2. Click the **Complete** tab, then click the **Change Estimate status to Completed** link.
   If you cannot see this link, you need to finish additional tasks before the estimate can be marked **Complete**.

3. Click the **Payment Tracker** tab near the upper-right corner of the **Complete** window.

4. In the **Item Grouping** window, select whether to group your line items by category or room. Click **OK**.

5. Review the **Actual Cash Value Benefits** in the lower left portion of the window.
   You shouldn't need to make any changes at this time. The amount in the **Total Payment Pending** field should be the same as the total in the **Outstanding ACV Settlement** field.

6. Click the **Submit for Payment** button.
   The **Record Payments** window appears.

7. Enter the date, a check number, and a note for the payment (if necessary), then click **Record Payment**.
   The **Total Payments Pending** field is reduced to $0.00.

Now that you have made the ACV payment, you can make any necessary RC payments.
8. When the insured presents you with the receipt for the replacement cost for a line item, enter the cost of the line item into the Actual Replacement Cost column for that line item.

Xactimate adjusts the amount in the Total Payments Pending field to reflect the amount the insured should be paid, based on the amount in the Actual Replacement Cost column.

Note: If this receipt does not cover the entire replacement amount, place a checkmark in the Partial checkbox.

9. Repeat step 8 for all line items that have receipts included.

10. When you have all replacement costs recorded, click the Submit for Payment button.

The Record Payments window appears.

11. Enter the date, a check number, and a note for the payment (if necessary), then click Record Payment.

The Total Payments Pending field is reduced to $0.00.

You can continue making RC payments until all payments have been made and finalized.

In addition to making ACV and RC payments, you can also use the Xactimate Payment Tracker to make advanced payments, Loss of Use payments, and to view coverage payment information. You can also override deferred amounts and ARC values.

TO VOID A PAYMENT

To void a payment in the Payment Tracker,

1. From within the Payment Tracker, click the Payments tab.

The Payment Tracker Payments window appears.

2. Right-click the payment you want to void and click Void Payment.

Note: Do not select this option unless you are sure you want to void the payment. Xactimate will not request a void confirmation.

Xactimate continues to display the payment, but it is now crossed out and can no longer be modified and is no longer applied against the total.
Contact Manager covers the following topics:

- To add an estimator (page 112)
- To add a reference to a project (page 112)
- To edit an estimator on the fly (page 112)
- To edit a reference on the fly (page 113)

To add an estimator

1. From within an estimate, click the Estimator SmartList button in the Personnel area of the Insured Info window.
   The Estimators SmartList appears.
   If this is your first estimator, the Add Estimator window also appears; skip step 2.
2. Click Add.
   The Add Estimator window appears.
3. Enter the estimator’s data in the two tabs: Estimator and Detail.
4. Click OK to close the Add Estimator window; click OK again to add the estimator to the Insured Info window.

To add a reference to a project

An estimate’s reference is usually a contact whose office referred the client.

1. From within an estimate, click the Reference SmartList button in the Personnel area of the Insured Info window.
   The References SmartList appears.
   If this is your first reference, the Add Reference window also appears; skip step 2.
2. Click Add.
   The Add Reference window appears.
3. Enter the reference’s data in the two tabs: Reference and Detail.
4. Click OK to close the Add Reference window; click OK again to add the reference to the Insured Info window.

To edit an estimator on the fly

1. From within an estimate, click the Estimator SmartList button in the Personnel area of the Insured Info window.
   The Estimator SmartList appears.
2. Highlight the estimator you want to modify, then click the Edit button.
   The Edit Estimator window appears.
3. Edit the estimator’s data in the two tabs: Estimator and Detail.
4. Click OK to close the Edit Estimator window, then click OK again to return to the Insured Info window.
TO EDIT A REFERENCE ON THE FLY

1. From within an estimate, click the Reference SmartList button in the Personnel area of the Insured Info window.
   The References SmartList appears.

2. Highlight the reference you want to modify, then click the Edit button.
   The Edit Reference window appears.

3. Edit the reference’s data in the two tabs: Reference and Detail.

4. Click OK to close the Edit Reference window, then click OK again to return to the Insured Info window.
CONTROL CENTER
The Control Center contains a number of varied topics, all which can be accomplished from the Xactimate Control Center:

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TO ASSIGN A SECURITY GROUP TO MULTIPLE USERS
This feature is only available to supervisors.

1. Click Services, then click Security Groups from the Control Center.
   The Security Group SmartList appears.

2. Highlight the security group you want to assign a user or users to.

3. Click Options, then click Group Members.
   The User/Resource SmartList appears.

4. Select the users that you want to assign to the selected security group.

5. Click OK, then click Close to exit the Security Group SmartList.

TO CHANGE THE DEFAULT E-MAIL PROGRAM IN WINDOWS XP
To change the default e-mail program Xactimate uses, select the desired e-mail program under Internet Explorer.

Note: The following steps are for Internet Explorer. They may differ if you are using a different web browser.

1. Connect to the Internet, and launch your Internet Explorer.

2. When your Internet Explorer window appears, click the Tools menu and choose Internet Options.
   If your Tools menu does not appear automatically, press the Alt key.

3. Click the Programs tab.
4. Click the **E-mail drop-down button** and select the e-mail program you would like to use as your default.

5. Click the **Apply** button, and then click **OK**.

You should now be able to launch the correct e-mail program from Xactimate.

**TO CHANGE THE DEFAULT E-MAIL PROGRAM IN WINDOWS VISTA AND WINDOWS 7**

To change the default e-mail program Xactimate uses, select the desired e-mail program in the Control Panel.

1. Click the Windows Start button and click Control Panel.

2. Click **Programs**.

3. Click **Default Programs**.

4. Click **Set your default programs**.

5. Click the program you want to use as your default e-mail program and click **Set this program as default**.

You should now be able to launch the correct e-mail program from Xactimate.

**TO CHECK THE NUMBER OF LICENSES INSTALLED ON A SERVER**

If you are unsure how many Xactimate workstations you are allowed to access at once on your network, you can check the number of licenses/tokens installed on the server by connecting to the Internet and logging into Xactimate as *Super*.

To do this, follow these steps:

1. Close all Xactware programs.

   If you are on a network, make sure that no one else on the network is running any Xactware programs.

2. Connect to the Internet if you are not already connected.

3. Click on the Windows **Start** button, then highlight **Programs, Xactware, and Xactimate 27**.

4. Log in with supervisory rights.

   If the SUPER login has not been changed, you can use the “super” password.

5. Click the **XactAnalysis** menu and choose **Remove Network Installs**.

   Clicking **Remove Network Installs** does not remove any licenses/tokens from your network at this time.

6. In the **Enter key code** window, make sure the displayed key code is identical to the key code you used to install Xactimate.

7. Click the **XactAnalysis** menu and choose **Connect**, then click **Next**.

   The **Remove Installs** window appears with the number of Xactimate installs currently on the network. This number is the number of workstations that have been installed. Since the server also needs a token to install, your network actually uses one more token than appears in the **Remove Installs** window. For example, if there are 5 available to remove, then there are actually 6 installed. This means 6 users can log in to the network at once.

8. If you do not wish to remove any licenses/tokens from your network at this time, click **Cancel**.

To add or remove any number of licenses/tokens to which you have access, contact the Xactware TeleNet Sales Team at 1-800-424-9228.
TO CREATE A MODEL OPENING STATEMENT
To create a model opening statement,

1. Click the **Document Modules** button from the **Control Center main page**.

2. Click **Add** on the **Model Statement SmartList**.

3. Enter a name for your statement in the **Model Name** field.

4. Enter the text of your statement in the **Statement Editor**.

5. When you’re finished, click **File**, choose **Exit**, then answer **Yes** to save changes.

TO CREATE A SECURITY GROUP
This feature is only available to supervisors.

1. In the **Control Center**, click the **Services** menu, then click **Security Groups**.

2. Click **Add**.

   The **Security Group Setup** window appears.

3. Enter a code (you can make up this code on the spot) and a description for the new security group.

4. Select the areas that members of the new security group will have access to.

   You can select all of the components of a security category by clicking the box to its left.

   If you want to select certain components of a category, but not others, click the plus symbol to expand the category, then select only the components of your choice.

5. When you have made your selections, click **OK**, then click **Close** to exit the **Security Group SmartList**.

TO DISABLE THE PASSWORD FEATURE
This procedure explains how to turn off the password feature so you can log into Xactimate with full security rights without having to enter a password. The procedure assumes that you are currently logged in with full supervisor rights.

*Note: By disabling the password feature, you allow your data to be accessed, modified, and even deleted by anyone with access to your computer. Be sure you really want to do this before proceeding.*

To disable the Password feature,

1. Create a new security group.

   a. Click the **Services** menu from the Control Center, then click **Security Groups**.

   b. Click the **Add** button.

      The **Security Group Setup** window appears.

   c. Type a code that you create (**INSECURE**, for example) and a description (**all rights**, for example) in the **Code** and **Description** fields.

   d. Click **Select All**, then click **OK**.

      You have created a new security group with full security privileges. Click the **Close** button to close the **Security Group SmartList**.
2. Turn off the password feature.
   a. Click the **Services** menu from the Control Center, then click **Security Setup**.
      The **System Settings** Security Setup window appears.
   b. In the **Password Usage** area of the **Security Setup** window, click the **Not Used** radio button.

3. Add a new user.
   a. Click the **Services** menu from the Control Center, then click **Users**.
      The **User/Resource SmartList** appears.
   b. Click the **Add** button and type the new user ID in the **Add New User/Resource** window and click **OK**.
      The **User Information** window appears.
   c. Enter your name and title in the fields provided, then click the **Security Group SmartList button**.
   d. Highlight the security group you created in step 1.
   e. Click **OK**.
      Xactimate returns to the **User Information** window.
   f. Click **OK**, then click the **Close** button on the **User/Resource SmartList**.

The next time you log in to Xactimate, type the new user ID, leave the password field blank and click **OK**.
Your new ID requires no password and has full security rights.

**TO EDIT A SECURITY GROUP**
This feature is only available to supervisors.

1. In the Control Center, click the **Services** menu, then click **Security Groups**.
   The **Security Group SmartList** appears.

2. Highlight the security group you want to modify, then click **Edit**.
   The **Security Group Setup** window appears.

3. Make any changes to the security group by selecting the areas that members of this security group should have access to.
   You can select all of the components of a security category by clicking the box to its left.

4. If you want to select certain components of a category, but not others, click the plus symbol to expand the category, then select only the components of your choice.

5. When you have completed your selections, click **OK**, then **Close** to exit the **Security Group SmartList**.

**TO FIND THE PRODUCT KEY CODE**
To find your product key code, you will need to view the product code information in the **About Xactimate** window.

1. From the Control Center, click the **Help** menu and choose **About Xactimate**.
   The 20-digit product key appears near the middle of the **About Xactimate** window.
TO IMPORT AN ACTIVITY
You can use the Import Activity feature to help create activities to add to your Activity Calendar and Activity Report.

1. From the Control Center main page, click the Modules menu and choose Activity Calendar. Click the Add button.
   The Add Activity window appears.

2. Click the Project SmartList button, select the project this activity is for, then click OK to return to the Add Activity window.

3. Click the Import button.
   The Activity Import SmartList appears.

4. Highlight the process and activity that fit the activity you are recording for the project, then click OK.
   The Activity Import SmartList disappears and the process, activity, and description you selected are added to the Add Activity window, along with any notes that were associated with the imported activity.

5. Fill in the additional fields in the Add Activity window, then click OK.
   The activity appears in the Activity Calendar as well as the project’s Activity Report.

TO LOG INTO XACTIMATE AS A NEW USER
To log in as a new user, you will need to log in to Xactimate with a new user ID.

To do this, follow these steps:

1. Close Xactimate if it is open.

2. Double-click the Xactimate icon on your Windows Desktop.

3. In the User ID field, enter a new user ID (one that you have not used before).

4. Leave the Password field blank and click OK.

5. Click Yes when asked if you would like to login as a new user.

6. Click Yes or No if asked if you want a personal password.
   Personal passwords are not required unless your security setup has been modified to require them.

7. Complete the information in the User Information window and click OK, or click Cancel to skip this window (filling in the User Information window is optional).

You are now logged into Xactimate as a new user.

*Note: You will not be able to log in as a new user if this feature has been turned off.*
**To Log into Xactimate with Supervisor Rights**

In order to acquire supervisor rights, you need to log in to Xactimate with the user ID SUPER.

*Note: Some profiles do not allow you to log in as SUPER. In these profiles, changes that require supervisory rights can usually be made in the Preferences window.*

To log in as SUPER, follow these steps:

1. Double-click the Xactimate shortcut on your desktop.
   
   The *Login* window appears.

2. Type SUPER in the *User ID* field and then type super (all lowercase letters) in the *Password* field. Select the profile you want to log in to, then click *OK*.

3. If you have changed the SUPER password, enter the appropriate password.
   
   You are now logged into Xactimate with supervisor rights and can make the necessary changes.

In order to make universal changes in a profile that does not allow the SUPER login, follow these steps:

1. Double-click on the Xactimate shortcut on your desktop.

2. Type your regular user ID and password (if you use a password) and then click *OK*.

3. From the *Control Center main page*, click the *User Preferences* tab, then click *Defaults* from the navigation tree on the left side of the window.

4. Make any necessary changes to the *Defaults* page, then log out of Xactimate.

5. Since preferences are user specific, you will need to modify the preferences for each user if you want them all to have the same default settings.
   
   To do this, log in with each user ID and repeat steps 3–4.

   *Make sure to keep all Xactimate user passwords in a secure location. We recommend that you write them down somewhere in case you need them.*

**To Modify Password Settings**

This feature is available to supervisors only. Other users will be able to view Security Setup settings, but cannot modify them. If you need to make a change, but don’t have supervisor rights, contact your supervisor.

1. From Control Center, click the *Services* menu, then click *Security Setup*.
   
   The *System Settings Security Setup* window appears.

2. Modify the password attributes according to your needs.
   
   The number of values can be increased or decreased by using the spin arrows next to each field.

3. Choose whether to require password usage, disable it, or make it optional by clicking the appropriate button in the *Password Usage* area.
   
   These options may vary by profile; however, the user ID SUPER will *always* require a password.

4. If you want to allow new users to log in, verify that the *Allow new user login* checkbox is checked.

5. Click the *Default Security Group SmartList button* and highlight a security group from the *Security Group SmartList*, then click *OK*. 
TO REMOVE AN XACTIMATE INSTALL TOKEN FROM A NETWORK
By connecting to the Internet and logging into Xactimate as a supervisor, you will be able to remove any of your licenses installed on the server. To do this, follow these steps:

1. Close all Xactware programs.
   If you are on a network environment, make sure that no one else on the network is running any Xactware programs.

2. Connect to the Internet if you are not already connected.

3. Click on the Windows Start button, then highlight Programs, highlight Xactware, then choose Xactimate 27.

4. Log in with supervisory rights.
   If the SUPER login has not been changed, you can use the “super” password.

5. Click the XactAnalysis menu and choose Remove Network Installs.
   Clicking Remove Network Installs does not actually remove any licenses/tokens from your network at this time.

6. In the Enter key code window, make sure the displayed key code is identical to the key code you used to install Xactimate.

7. Click the XactAnalysis menu and choose Connect, then click Next.
   The Remove Installs window appears with the number of Xactimate installs currently on the network. This number is the number of workstations that have been installed; since the server also needs a token to install, your network actually uses one more token than appears in the Remove Installs window. For example, if there are five available to remove, then there are actually six installed. This means six users can log in to the network at once.

8. Double-click the number of licenses you have available.
   A window asks how many installs you want to remove.

9. Select the appropriate number, then click OK.

10. Click the Next button.
   A connection window appears, then a setup window lets you know that the operation was successful.

11. Click OK.

To add or remove the number of licenses/tokens you have available, please contact the Xactware Sales Department at 1-800-424-9228.

See also:
“To check the number of licenses installed on a server” on page 115
TO SET UP A NEW USER
This feature is usually available only to supervisors.

1. Click the Control Center Services menu, then click Users.
   The User/Resource SmartList appears,

2. Click Add.
   The Add New User/Resource window appears

3. Enter the ID of the new user (usually initials) in the Enter new user ID field and click OK.
   The User Information window appears.

4. Enter the name and title of the new user.

5. If this user will be assigned a different security group than the default, click the Security Group SmartList button to select from the available groups.

6. If you want to assign a password to this user, click Change Password.
   The Password window appears.

7. Type the password in the New Password field. Type it again in the Confirm new password field.

8. Click OK to return to the User Information window, then click OK again to return to the User/Resource SmartList.

9. Click Close to exit the User/Resource SmartList.

TO SET THE SECURITY GROUP DEFAULT
This feature is available only to supervisors.

1. In the Control Center, click the Services menu, then click Security Setup.
   The System Settings Security Setup window appears.

2. Click the Default Security Groups SmartList button.
   The Security Group SmartList appears.

3. Highlight the security group you want all new users to be assigned to by default and click OK.

TO TURN OFF AUTOMATIC UPDATES
To stop service packs from automatically being downloaded, you will need to uncheck the option to request updates when connecting to XactAnalysis.

To do this, follow these steps:

1. Log in to Xactimate with supervisor rights.
   If the supervisor password has not been changed, you can log in with the user ID SUPER and the password super.

2. From the Control Center Dashboard window, click the System Settings tab.
   The System Settings General page appears.
3. Uncheck the **Request Service Packs when connecting** checkbox.

You will no longer receive automatic updates (including service packs) when connecting to XactNet.

If you want the updates to automatically run, follow these same steps, this time making sure there is a checkmark in the **Request Service Packs when connecting** checkbox

*Note:* You will need to check the **Request Service Packs when connecting** checkbox before adding any new profiles to your system.

**To update to the most recent service pack**

In a constant effort to improve our products, Xactware occasionally provides service packs to our customers. Service packs are 2 to 4 MB files that take anywhere from 5 to 50 minutes to download, depending on the speed of your Internet connection.

*Note:* It is always important to back up all Xactimate data before updating the program. Click here for information on how to prepare for an Xactimate Service Pack.

To download the service pack automatically,

1. Launch Xactimate and log in with supervisor rights.

   If it has not been changed, you can log in with the user ID **SUPER** and the password **super**.

2. From the **Control Center Dashboard** window, click the **System Settings** tab.

   The **System Settings General** page appears.

3. Make sure the **Request Service Packs when connecting** checkbox is checked.

4. Click the **Dashboard** tab.

5. In the **XactAnalysis Communications** pane, click the uppermost drop-down button and select **Inbox**.

6. Click the **XactAnalysis** menu and choose **Connect**.

   If there is a service pack available, it is automatically downloaded.

7. To run the service pack, close all Xactware applications. If you are running Xactimate on a network environment, make sure that there are no Xactware applications running on any of your workstations.

8. Update your computer and all workstations on your network to the most current version of Xactimate.

9. Once the service pack has been run on all Xactimate computers, you can check to make sure the version has been updated by logging into Xactimate and selecting **About Xactimate** from the **Help** menu.

   The build number is listed at the bottom of the **About Xactimate** window after the date.
TO UPLOAD REPORTS IN ENGLISH ONLY
By default, Xactimate creates reports in multiple languages. You can choose to send reports in English (or French, or Spanish) only.

1. From the Control Center main page, click the System Settings tab.
2. Click Automatic Upload in the navigation tree on the left.

Xactimate will now send reports in English only.

Note: This topic assumes you are working in English. If you are working in the French or Spanish versions, then following these steps will upload French or Spanish copies of your reports only.

TO VERIFY THE XACTIMATE DATA PATH
To verify the Xactimate data path, you will need to check the System Settings window or in the Xactware registry key in the Windows Registry Editor.

Note: If you are not able to log in to Xactimate, skip the first two steps and continue by verifying the data path in the Registry Editor.

1. Launch Xactimate.
2. From the Control Center main page, click the System Settings tab.
3. In the navigation tree on the left, click Configuration.
   The Suite Data Path field is located at the top of this window.

If you are unable to open Xactimate, you must check the data path in the Registry Editor.

1. From your Windows Desktop,
   For Windows XP,
   a. Click the Start button, then select Run.
   b. Type regedit in the Open field, then click OK.
   For Windows 7 and Vista,
   a. Click the Start button and type regedit.
   The Registry Editor appears.
2. Click the ➤ or ➔ next to HKEY_LOCAL_MACHINE.
3. Click the ➤ or ➔ next to SOFTWARE.
4. Click the ➤ or ➔ next to Xactware.
5. Click the Xactimate 27 folder.
6. On the right side of the window, find LOCATION.
   The data path appears in the Data column to the right.
TO VERIFY THE XACTIMATE VERSION NUMBER
To verify the version of Xactimate that you are using, view the version number in the About Xactimate window.

1. From the Control Center, click the Help menu.

2. Click About Xactimate.
   On the About Xactimate window, you will see a version number and date (e.g., 26.0.75.7753 01-15-2007). This is the version of Xactimate that you are currently using.
DATA TRANSFER
The Data Transfer section helps you understand the following topics:

| ▲ To back up all Xactimate data using Data Transfer Backup (page 125) | ▲ To back up all Xactware data using Microsoft Windows (page 126) |
| ▲ To back up data to a CD (page 126) | ▲ To back up specific data (page 127) |
| ▲ To copy estimates and price lists to a different profile (page 128) | ▲ To reroute an XactAnalysis assignment from one Xactimate user to another (page 128) |
| ▲ To restore all Xactware data using Microsoft Windows (page 130) | ▲ To restore data from a CD (page 131) |
| ▲ To restore Xactware data and system files (page 132) | ▲ To retrieve Xactimate data using Data Transfer Backup (page 133) |
| ▲ To retrieve data using Data Transfer (page 133) | ▲ To transfer data using the Data Transfer feature (page 135) |
| ▲ To transfer data to another user (page 134) | |
| ▲ Workflow for downloading and uploading assignments (page 135) | |

To back up all Xactimate data using Data Transfer Backup
To protect your data from accidental loss, we recommend regular backups. The Data Transfer Backup feature backs up all your Xactimate data.

1. From within the Xactimate Control Center, click on the Services menu and choose Data Transfer Backup.

2. On the Data Transfer Backup window, select Send as the action.

3. In the To field, enter the path you will use to transfer the data.
   - If you’re sending your data to a removable media drive (thumb drive, external hard drive, etc.), enter the drive letter.
   - If you’re sending your data to a location on a network drive, enter the network path.

   You can use the Browse button to find the correct path.

   Note: Avoid saving your backup to the same hard drive where your data is located; if that hard drive should fail, you would lose your backup as well as your original.

4. After you have selected the correct path, click the Send button at the bottom of the window to back up all Xactimate data to the location you selected.

   When the backup process is finished, the Backup Progress window disappears.

See also:
“To restore Xactware data and system files” on page 132
TO BACK UP ALL XACTWARE DATA USING MICROSOFT WINDOWS

To automatically back up Xactware files,

1. From your Windows Start menu, open a command line.
   a. Click the Start button and click Run.
   b. Type cmd, then click OK.

   A DOS command window appears.

2. Type cd\program files\xactware\xactimate27\core, then press Enter.

   This path is the default path for Xactimate version 27. If you installed Xactimate to a different path, enter the correct path to the Xactimate version 27 CORE folder.

3. Type backup.exe /backup, then press the space bar, followed by the complete path to where you want the Xactimate backup files to be saved.

   For example, if you were backing up your Xactimate files to a network directory, you might type backup.exe /backup h:\xactimatebackup.

   Note: If your data path has spaces in it, you must type the path with quotes around the path name; e.g., backup.exe /backup h:\"xactimate backup".

4. Press Enter.

   You will see an Xactimate Backup/Restore Data window appear. This window will run your backup, then disappear when it is finished.

5. Type exit to close the command window.

   You can confirm that the backup file has been saved successfully by going to the folder where you saved the file and making sure that xwbackup.bak is in the folder.

   If you have software that allows you to back up all your computer files, you can integrate this procedure with your third-party software; you must simply make sure that you enter the correct path names for both the files you want backed up (cd\program files\xactware\xactimate27\core), along with the backup.exe command and the path where you want to place them (backup.exe /backup h:\"xactimate backup").

TO BACK UP DATA TO A CD

Read & write CD burners automatically mark your data as Read-only. Because of this, your data must be copied to and from the CD in a way that is modifiable. To correctly back up your data to a CD and then retrieve it again, you will need to do the following:

1. Right click on your computer’s desktop and highlight New and then select Folder.

   New Folder appears on the desktop.

2. Right-click New Folder and choose Rename. Type Xactimate Data and press Enter.

3. Log into Xactimate with your user ID.

4. Inside the Control Center main page, click the Data Transfer link.

   The Data Transfer window appears.

5. Select Folder as the Transfer Type and select Send as the Action.
6. In the To field, click on the Browse button. In the Browse for Folder window, select Xactimate Data from the Windows Desktop and press OK.

7. Click Next.

8. Highlight the type of data you want to transfer (e.g. Project or Macro), then click the SmartList button at the bottom of the window. In the Smart List window, highlight the items you want to transfer then click OK.

9. Repeat this step with any categories you need to transfer in the Transfer Item window.
   This includes price lists, company headers, macros, Sketch templates, claim rep\estimators, references, price list filters, and contractors.

10. In the Other Data window, highlight any additional items you want to transfer.
    This includes group codes, model opening statements, price notes, types of loss, unit types, and ZIP/postal codes.

11. Click Send.

12. When Xactimate tells you the operation has been completed successfully, click OK.

13. Use your CD writing software to copy the Xactimate Data folder to your CD.

See also:
“To restore data from a CD” on page 131

TO BACK UP SPECIFIC DATA
If you want to make a complete backup of all data, use the Data Transfer Backup feature. The following procedure will help you backup specific items such as estimates, price lists, etc.

1. From the Control Center, click Services, then Data Transfer.
   The Data Transfer window appears.

2. Verify that Folder is selected in the Transfer Type area, and Send in the Action area.

3. Type the path you want to back up your data to in the To field near the bottom of the window, or use the Browse button to select a path.

4. Click Next.

5. In the Transfer Item field, click the type of item you want to back up (projects, for example), then click SmartList button beneath this field and select the specific item(s) you want to back up. Click OK to return to the Data Transfer window.

6. Repeat step 5 for each item type you want to back up (price lists, macros, company headers, etc.).

7. In the Other Data field, click any of the additional types of data you want to back up.

8. Click the Send button to back up the selected data to the specified drive or device.
TO COPY ESTIMATES AND PRICE LISTS TO A DIFFERENT PROFILE

By design, price lists downloaded in one profile are not available in a different profile. The following steps detail how to transfer price lists to a different profile.

1. Launch Xactimate in the profile you want to copy a price list from.

2. Use the Data Transfer feature to transfer the data you want copied to a convenient location on your hard drive (see "To transfer data using the Data Transfer feature" on page 135).

   While traditionally we recommend you back up files to a storage area other than your hard drive, this is not necessary since you’re not using this data path for data storage.

3. If you’re not already there, click the Control Center tab to open the Control Center main page.

4. Click the Profiles drop-down button near the top right of the window and select the profile you want to copy your Xactimate data into.

5. Use the Data Transfer feature to retrieve the data you copied from its location on your hard drive (see “To retrieve data using Data Transfer” on page 133).

TO REROUTE AN XACTANALYSIS ASSIGNMENT FROM ONE XACTIMATE USER TO ANOTHER

Occasionally you will download an assignment that needs to be edited or completed by a different Xactimate user at another company. There are two methods of transferring assignments from one computer to another that will not interfere with uploading:

- The first and preferred method is to transfer the assignment via XactAnalysis.

- The second method is to use the referral method to transfer an assignment to a different user.

A. To transfer the assignment via XactAnalysis, the home computer first receives a notification from the carrier that is sending the assignment.

1. Download the assignment (page 236) to the home computer.

2. Use the Data Transfer by XactAnalysis feature (page 134) to send the assignment to the other user’s computer (the “satellite” computer).

   Note: The assignment will disappear off the home computer’s Project SmartList.

3. Download the assignment from the satellite computer.

4. Once the satellite finishes the assignment, change the status (page 107) of the assignment to Complete, then connect to XactAnalysis to send the assignment back to the home computer.

   Do not use the Data Transfer feature to send the assignment back.

   Note: The assignment will not leave the satellite’s Projects SmartList.

5. Download the assignment to the home computer.

   The estimate appears in the Projects SmartList as being A/In Progress.

6. Make any necessary changes before uploading (page 239) the assignment to the original sender.
B. To duplicate and transfer the assignment, then copy and paste the satellite information into the original assignment for uploading,

1. On the home computer, open the Project SmartList by clicking the Project tab from the Control Center.

2. Right-click the assignment you want to transfer and select Duplicate.

   The Duplicate Project window appears.

3. Change the project name by adding at least one character to the end of the estimate name (i.e. Project2 or ProjectB). Click OK.

4. You can now transfer the duplicate assignment via a local network or a removable media source, such as CD (page 126) or thumb drive.

5. Retrieve (page 135) the duplicate assignment on the satellite computer and do the necessary work on the assignment.

6. Once the satellite finishes, use Data Transfer to send the estimate back to the home computer.

7. Use Data Transfer on the home computer to retrieve the assignment.

8. Once the duplicate assignment has been retrieved onto the home computer, you can copy and paste the information into the original assignment (since it was the duplicate that was transferred) to be uploaded (page 239).

To copy an estimate that was created in the Estimate Items window,

a. Click the Estimate Items tab in the duplicate assignment.

b. In the Grouping pane, highlight everything but the name of the estimate by holding the Ctrl button on your keyboard and clicking each room.

c. Click the Edit menu and select Copy.

d. Click the Minimize button [-] to shrink the duplicate assignment, then open the original assignment.

e. Click the Estimate Items tab in the original assignment.

f. Click the Edit menu and select Paste.

   The dimensioned rooms appear, along with all of their line items.

To copy an estimate that was created in Sketch,

a. Click the Sketch tab in the duplicate assignment.

b. In the Sketch workspace, click the Zoom to Extents button 📈, then click the upper left corner of the Sketch workspace and drag diagonally to the bottom right corner.

   This should select the entire level you’re on.

c. Click the Edit menu and select Copy.

d. Click the Minimize button [-] to shrink the duplicate assignment, then open the original assignment.

e. Click the Sketch tab in the original assignment.

f. Click the Edit menu and select Paste.

   The image of the sketch level appears, attached to your mouse pointer.

g. Click the mouse anywhere in the Sketch workspace to paste the sketch, along with its associated line items.
h. If the duplicate assignment has multiple levels in its Sketch, create corresponding levels (page 204, page 205) in the original assignment, then repeat steps b–q to paste each level in the original assignment.

You can now make any necessary changes before completing and uploading the assignment (page 239) to the original sender.

Even though there are two methods to reroute an assignment to another Xactimate user, we recommend transferring the assignment through XactAnalysis as described above in section “A” as this method is easier and provides less room for error.

TO RESTORE ALL XACTWARE DATA USING MICROSOFT WINDOWS

To automatically restore your backup Xactware files,

1. From your Windows Start menu, open a command line.
   To do this (Windows XP)
   a. Click the Windows Start button and click Run.
   b. Type cmd, then click OK.
   (Windows Vista)
   a. Click the Windows Start button and type cmd.
   b. Click cmd.exe.
   (Windows 7)
   a. Click the Windows Start button and type cmd.
   A DOS command window appears.

2. Type cd\program files\xactware\xactimate27\core (for Windows XP) or cd\programdata\xactware\xactimate27\core (for Windows Vista/7) then press Enter.
   This path is the default path for Xactimate version 27. If you installed Xactimate to a different path, enter the correct path to the Xactimate version 27 CORE folder.

3. Type backup.exe /restore, then press the space bar, followed by the complete path to where the Xactimate backup is saved.
   For example, if you were restoring your Xactimate files from a network directory, you might type backup.exe /restore h:/xactimatebackup.
   Note: If your data path has spaces in it, you must type the path with quotes around the path name; e.g., backup.exe /restore h:/"xactimate backup".

4. Press OK.
   The automatic restore feature begins running. You will see an Xactimate window appear, then a message that the restore was run successfully.

5. Type exit to close the command window.

See also:
“To back up all Xactware data using Microsoft Windows” on page 126
“To back up all Xactimate data using Data Transfer Backup” on page 125
To restore data from a CD

To retrieve your data from the CD, follow the steps below:

1. Copy the Xactimate Data folder from your CD to your Windows Desktop by double-clicking My Computer on your desktop, double-clicking the CD, right-clicking the Xactimate Data folder and choosing Copy. Right-click on your desktop and choose Paste.

2. Double-click the Xactimate Data folder on your desktop to open it. Click the Edit menu and choose Select All.

3. With all of the items in the folder selected, right-click on an item and choose Properties.

4. In the Properties window, click the General tab and then un-check the Read-only check box. Click OK.

5. Log in to Xactimate with your user ID.

6. Inside the Control Center main page, click the Data Transfer link.

7. Select Folder as the Transfer Type and select Retrieve as the Action.

8. In the From field, click the Browse button. In the Browse for Folder window, select Xactimate Data from the Windows Desktop and press OK.

9. Click Next.

10. Highlight the type of data you want to retrieve (e.g. Project or Macro), then click the SmartList button attached to the field at the bottom of the window. In the SmartList window, highlight the items you want to retrieve and then click OK.

11. Repeat this step with any categories you need to retrieve.

   This includes price lists, company headers, macros, Sketch templates, claim reps, estimators, references, and contractors.

12. In the Other Data window, highlight any additional items you want to retrieve.

   Highlight only the data that was sent to the CD.

13. Once you have all of the data selected, click the Retrieve button.

   Xactimate tells you when the operation has been completed successfully.
TO RESTORE XACTWARE DATA AND SYSTEM FILES
If you make regular backups, you can replace lost or damaged files with clean program files by using Data Transfer Backup. This includes all estimates, price lists, contact data, etc.

*Note:* When using the Data Transfer Backup feature, it is *critical* that you restore your data to the exact version and build number of Xactimate that you backed it up from. Restoring into other versions of Xactimate could result in a loss or damage of data.

To restore all Xactware data and system files,

1. From the Xactimate Control Center, click the Services menu and select Data Transfer Backup.
   The Data Transfer Backup window appears.
   *Note:* All project windows and other modules must be closed before restoring Xactimate.
2. Under Action, click Retrieve.
3. In the From field, enter the path where you saved the backup.
   *Note:* Backed-up data can only be restored to the same drive letter and directory structure it was backed up from. You should not use this feature, for example, if your intention is to back up from drive C: and then re-install Xactimate to drive D: and restore your data to that drive.
4. Click the Retrieve button.
   Xactimate restores all your program files.

⚠️ *We recommend that you make regular backups of your data.*

See also:
“*To back up all Xactimate data using Data Transfer Backup*” on page 125

TO RETRIEVE A PROJECT THAT WAS ARCHIVED IN XACTIMATE VERSION 24

1. In the Xactimate Control Center, click the Projects tab.
2. In the Project SmartList, click Options, then choose Data Transfer.
   This opens the Data Transfer Project window.
3. From the Data Transfer Project window, select Folder as the transfer type, and then select Retrieve as the action.
4. Select the path you want to retrieve your archived project(s) from.
   Do this by clicking the Browse button to search for the location or by typing the path directly into the Path field.
5. Click the Projects SmartList button to see the Project SmartList.
6. Highlight the project(s) you would like to retrieve and then click OK.
   The name of the project appears in this field, or “<MULT>” appears if you selected more than one project.
7. Click OK.
   A message informs you when the retrieving process is complete.
8. Click Close to close this window.
   The project(s) will appear on your Projects SmartList.
TO RETRIEVE DATA USING DATA TRANSFER
You must make sure you’re in the same profile that the data was originally transferred from.

1. From the Control Center, click Services, then Data Transfer.

   The Data Transfer window appears.

2. Verify that Folder is selected in the Transfer Type area, and Retrieve in the Action area.

3. Enter the path you want to retrieve your data from in the Retrieve data From field, or use the Browse button to select a path.

4. Press Next.

5. Highlight the type of data you want to retrieve (e.g. project, price lists, macros, etc.) in the field on the left, then click the items you want to retrieve in the window to the right.

   You can select multiple items by holding the Control key while highlighting each item, or you can select a range of items by clicking an item, then holding the Shift key and clicking another item (this selects all items between the two items you clicked).

   Xactimate displays the number of items in each category to the right of the category type.

6. Repeat this step with any categories you need to retrieve.

   This includes price lists, company headers, macros, Sketch templates, claim rep/estimators, references, price list filters, and contractors.

7. Once you have all of the data selected, click the Retrieve button.

   Xactimate tells you when the operation has been completed successfully and asks if you want to see the results of the data transfer.

   Note: If Xactimate runs into a duplicate item, it gives you the option of skipping the item, merging it with the same-named item, or overwriting the pre-existing item.

   When finished, Xactimate displays the transfer results of the data transfer.

8. Click Close.

   The data appears in the appropriate SmartLists.

TO RETRIEVE XACTIMATE DATA USING DATA TRANSFER BACKUP
To retrieve/restore your Xactimate data, follow these steps:

1. From within the Xactimate Control Center, click the Services menu and choose Data Transfer Backup.

2. Select Retrieve as the action.

3. In the From field, enter the path to the location from which you want to retrieve the data.
   - If you’re retrieving this data from a removable media drive (i.e. floppy disk, etc.), enter the drive letter.
   - If you’re retrieving this data from a network drive, enter the network path from which you are retrieving the data.

   You can use the Browse button to find the correct path.

4. After you have selected the correct path, click the Retrieve button at the bottom of the window.

   Xactimate retrieves the selected data.
TO TRANSFER DATA TO ANOTHER USER
To transfer Xactimate data from one user to another via XactAnalysis, the first user utilizes the Data Transfer feature and sends the data to the second user's XactNet address. The second user then connects to XactAnalysis and downloads the data sent from the first user. Both users must be using the same Xactimate profile.

Note: Both users must use different copies of Xactimate, rather than a single copy with multiple licenses.

To send data, the user sending the data must do the following:

1. Open Xactimate.

2. Click the Data Transfer link from the Control Center main page.

   The Data Transfer window appears.

3. Select XactAnalysis as the transfer type, then select Send data via XactAnalysis as the action.

   Note: If you are unable to select XactAnalysis as the transfer type, then you must first register with XactAnalysis (page 237).

4. In the To field, enter the XactNet address of the Xactimate user you are sending data to, or click the SmartList button to choose a contact you are sending this data to.

   Note: For information checking your XactNet address in Xactimate, see page page 237.

5. Click Next.

6. In the Transfer Item window, highlight the type of data you want to transfer (project, price list, etc.) and then click the SmartList button attached to the field at the bottom of the window. Highlight the item(s) you want to transfer, and then click OK to return to the Data Transfer window.

7. Repeat step 6 with any category of data you need to transfer in the Transfer Item window.

   This includes price lists, company headers, macros, Sketch templates, claim reps/estimators, references, price list filters, and contractors.

8. In the Other Data window, highlight any additional items you want to transfer.

   This includes group codes, model opening statements, price notes, types of loss, and unit types.

9. Click the Send button.

   A progress bar shows you the progress of your transfer.

10. Click Close.

11. Make sure you are in the Control Center Dashboard window, then click the drop-down button from the top of the XactAnalysis Communications pane. Select Outbox.

    The XactAnalysis Outbox appears. You should be able to see the items you are transferring to the other user.

12. Make sure you are connected to the Internet.

13. Click Connect at the top right of the Control Center main page.

    Clicking Connect starts the file transfer process and sends the data. This data will no longer appear in your XactAnalysis window.

See also:
“To receive data from another user” on page 237
TO TRANSFER DATA USING THE DATA TRANSFER FEATURE
You can transfer data for any number of reasons, including backups and allowing another computer to read the data.

Note: If you plan on backing up all Xactimate files, we recommend you use the Data Transfer Backup feature (page 125).

To backup your data, follow these steps:

1. Inside the Control Center, click Services, then Data Transfer.
   The Data Transfer window appears.

2. Verify that Folder is selected in the Transfer Type area, and Retrieve in the Action area.

3. In the To field, enter the path you will transfer the data to.
   If you’re sending your data to a removable media drive (e.g., thumb drive), enter the drive letter. If you’re sending your data to a location on a network drive, enter the network path you will use to send the data. Click on the Browse button to help you find the correct path.

4. Click Next.

5. Highlight the type of data you want to send (e.g. project, price lists, macros, etc.) in the field on the left, then click the items you want to send in the SmartList to the right.
   You can select multiple items by holding the Control key while highlighting each item, or you can select a range of items by clicking an item, then holding the Shift key and clicking another item (this selects all items between the two items you clicked).
   Xactimate displays the number of items in each category to the right of the category type.

6. Repeat this step with any categories you need to transfer.
   This includes price lists, company headers, macros, Sketch templates, report templates, claim rep/estimators, references, price list filters, contractors, and system tables.

7. With the appropriate data selected, click the Send button.
   Xactimate sends the data to the selected folder.

8. Click Close.
   Copies of the selected data are now saved to the data path you indicated.

WORKFLOW FOR DOWNLOADING AND UPLOADING ASSIGNMENTS
The assignment workflow consists of adding a notification rule in XactAnalysis for Service Providers, connecting to XactAnalysis to download the assignment, completing the assignment in Xactimate, and then connecting to XactAnalysis again to upload the assignment.

ADDING A NOTIFICATION RULE
A notification rule tells any or all of your assignors (the insurance company that sends you your assignments) how and when you want to be notified of a specific type of assignment. This way you could instruct Insurance Company #1 to send all of your assignments by fax between the hours of 8 A.M. and 5 P.M., but Insurance Company #2 to send emergency assignments by e-mail 24 hours a day.
To add a notification rule in XactAnalysis for Service Providers:


2. Login with your user ID and password.

3. Click Notification Rules from the Administration menu on the main page.

4. Click the Add New Notification button.

5. Select a type of notification for this rule and click Next.

6. Select the assignor you’re creating the notification for, then click Next.
   You can select All if you would like this rule to apply for all assignors.

7. Enter the start time for notification if there is a time before which you don’t want to be notified.
   Enter this time in Mountain Time. For example, if you don’t want to be contacted before 8:00 A.M. Eastern Time, enter 6:00 AM in this field. If you can be notified 24 hours a day, enter 12:00 AM in this field.

8. Enter the end time for notification if there is a time after which you don’t want to be notified.
   Enter this time in Mountain Time. For example, if you don’t want to be contacted after 8:00 P.M. Pacific Time, enter 9:00 PM in this field. If you can be notified 24 hours a day, enter 12:00 AM in this field.

9. Click Next.

10. Place a checkmark next to the days of the week you want to be notified, then click Next.

11. Select the priority for the notification you’re creating and then click Next.
   For example, you might have your fax set to normal priority assignment notification from 8:00 A.M. to 8:00 P.M. But you might also have another notification set up to notify you at all times on your pager for emergency assignments.

12. Highlight the contact method you would like the assignor to use to notify you of assignments that fit the priority criteria.
   The contact method is the phone, fax, e-mail, pager specific number/address the assignor uses to contact you. If the correct notification method is not already listed in the Contact Method window, do the following:
   a. Click Add.
   b. Select the type of notification you would like to receive (e-mail, fax, pager, voice (telephone) or XactAnalysis address).
      The option you select here affects the rest of the fields in this window.
   c. Enter the address (if you selected e-mail or XactAnalysis) or number (if you selected fax, pager, or voice) that should be used to contact you.
   d. Enter the telephone contact or PIN/Pager # if you selected voice or pager.
   e. Click OK.
      The new contact method is entered into the Notification Rules page.

13. Click the Finish button in the Notification Rule Setup Wizard window.
**CONNECTING TO XactAnalysis**
See page 236 for instructions on connecting to XactAnalysis to download the assignment. When finished, you can see the downloaded assignment in the Projects SmartList with a status of A/In Progress.

You should be able to review the claim information that came with the assignment. All assignments come with a designated checkpoint price list and estimate price list as shown on the Parameters window. The checkpoint price list is used as a comparison basis for the Variation report that is automatically sent back with your completed estimate.

**COMPLETING THE ASSIGNMENT**
Before you complete the assignment in Xactimate, make sure you are in the same profile the assignment was downloaded into or you will not be able to see the assignment.

To complete the assignment in Xactimate:

1. From the Control Center, click the **Projects** tab.
   The assignment will be displayed in the **Projects SmartList**.

2. Highlight the assignment and click **Open**.

3. Complete this assignment by adding and dimensioning the necessary rooms and entering the scope of work to be done.

4. After you’ve finished the estimate, change the status to **Complete** (page 107).

5. Click **Save & Exit** near the top right of the estimate window.

6. Once you have completed the assignment, the assignment should appear in your **Projects SmartList** with a status of A/Completed.

**UPLOADING TO XactAnalysis**
The instructions for uploading an assignment to XactAnalysis are the same as for downloading: simply click the **Connect** link and let XactAnalysis do the rest.

After the project has been uploaded, it appears in the **Projects SmartList** with a status of A/Uploaded.

*Note:* Assignments can only be received by a computer that has a qualified XactAnalysis address. Registering your XactAnalysis address (page 237) and verifying with the carrier that your address has been qualified will ensure that you can receive assignments.
**ESTIMATE ITEMS**
The *Estimate Items* section displays the following topics:

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<th>▲ To add tags to a line item (page 139)</th>
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</tr>
</tbody>
</table>

**TO ADD AND DELETE LINE ITEMS IN THE SUMMARY LIST**
You can add new line items, edit the line items that already appear, and delete line items from within the Summary list.

**TO ADD A LINE ITEM**

1. From within an estimate, click the *Estimate Items* tab, then click *Summary List* from the center window.
   The Summary List appears.

   *Note: If you don’t see the Summary List, make sure that Items is selected in the upper left portion of the window.*

2. Press your keyboard's Control key, then click each room or level you want to add this price list item to.
3. In the Search pane, click the Search Price List link.

You can use Similar-Item Search, the Related-Item Search, Search Price List by Division, or the Reference Search methods to find the line item instead of the drill-down method if you prefer.

4. Drill-down on the price list divisions/categories to find the price list item you're adding.

5. Double-click the line item.

Either a default amount of the line item will be entered into each room based on its standard variable, or a quantity of 1.00 will be entered if there is no valid default variable formula.

6. Edit the quantity (if necessary) of the line items added to each room by clicking the individual room in the Grouping pane, then highlighting the line item and entering the correct quantity.

**TO DELETE A SINGLE LINE ITEM FROM A ROOM OR AN ESTIMATE**

1. Highlight the room(s) you want to remove the line item from.

Mark all rooms that contain this line item if you want to remove it from the entire estimate. Hold the Control key on your keyboard to select more than one room.

2. Right-click the line item in the Summary List.

Make sure the entered line item has been clicked, not just a single cell of the line item.

3. Choose Delete from the right-click menu.

The line item is removed from the selected room.

**TO ADD TAGS TO A LINE ITEM**

You can add a tag to a line item from within the Line Item Entry.

1. Select (or enter) a line item in the Item List area.

The line item’s detail appears in the Line Item Edit pad.

2. Click the Add Tag link to the right of the Line Item Edit pad.

A drop-down field appears.

*Note: If you don't see the Add Tag link, you can either click the Edit Tags link near the top of the Line Item Entry pad or click Maximize button to enlarge Xactimate to fill your screen.*

3. Click the drop-down button and select the type of tag you want to add.

If you don't see the correct type of tag, you can add one from the Line Item Tags SmartList.

4. Enter the proper tag information in the field that appears to the right, or click the drop-down button to select the correct information that will go on the tag.

For example, you can enter an employee's name, or a specific date.

5. Repeat steps 2–4 for each data set you want to appear on the line item's tag.

6. Click OK on the Line Item Entry pad (you may have to click OK from the Tags window first).

Xactimate saves the tag data.
To add a tag to multiple line items,

1. Highlight the line items you want to add the tag to, then click the Global Changes Wizard button.
   The Global Changes Wizard appears.

2. Click the Make Changes to drop-down and select Tags.
   The Tags window appears.

3. Make sure the Add Tags radio button is selected, then click the Add a Tag link.

4. Click the Tag drop-down button and select the type of tag you want to add.
   If you don’t see the correct type of tag, you can add one from the Line Item Tags SmartList.

5. Enter the proper tag information in the field that appears to the right, or click the drop-down button to select the correct information that will go on the tag.
   For example, you can enter an employee’s name, or a specific date.

6. Repeat steps 3–5 for each data set you want to appear on the line item's tag.

7. Click OK.
   Xactimate saves the tag data.

**To add tags to line item macros**

Xactimate allows you to add tags to macros from within the Line Item Entry.

1. From within the Estimate Items window, click Tools and choose Retrieve Macro.
   The Macro SmartList appears.

2. Highlight the macro you want to add tags to and click Edit.
   See “To create a line item macro” on page 145 for instructions on creating a macro.

3. In the lower half of the window, double-click the line item you want to add the tag to.

4. Click the Add Tag link in the top half of the window.

5. Click the drop-down button and select the type of tag you want to add.
   If you don’t see the correct type of tag, you can add one from the Line Item Tags SmartList.

6. Enter the proper tag information in the field that appears to the right, or click the drop-down button to select the correct information that will go on the tag.
   For example, you can enter an employee's name, or a specific date.

7. Click Add Tag and repeat steps 5–6 for each data set you want to appear for this line item.

8. Click OK in the upper half of the window.

9. Repeat steps 3–8 for each line item you want to add tags to.

10. Click OK on the Macro Information window.
    Xactimate saves the tag data, closes the Macro Information window, and returns to the Macro SmartList.
TO CHANGE CATEGORY PRICE ATTRIBUTES
To change your estimate's price attributes, follow these steps:

1. In the Project SmartList, highlight the estimate you want to modify and click Open.
2. Click the Estimate Items tab.
3. Select a room from the Grouping pane.
4. Click the Edit menu and choose Global Changes Wizard.
   The Global Changes/Factoring window appears.
5. Determine the categories you want to change.
   - Click All to change all categories in your estimate.
   - Click Select if you want to change only a few categories, then choose the categories you want to modify from the Category SmartList. Click OK when you've selected them all.
   
   Note: To highlight more than one category at a time, hold the Ctrl key on your keyboard while highlighting the categories.

6. Click the Make Changes To drop-down button and select the type of price attribute you want to modify.
   
   Note: You can choose Coverage, Factoring, Taxes/O&P/Repaired, Tags, and Depreciation.

7. In the Other Global Changes section, select the appropriate options to change the attributes for your estimate. If you want to keep the price list defaults, leave it selected.

8. To confirm each price change, click Pause and verify each item.

9. Once you have selected all the appropriate options, click OK.

Profiles may be customized to meet the specific needs of a broad range of users. Depending on the profile you're using, certain options mentioned may not be available.

TO CHANGE DEPRECIATION
To change the depreciation for line items in the selected room(s),

1. Click the Estimate Items tab of an estimate that has line items already entered, then click the Items tab to see the Items page.

2. Highlight a room that contains item you want to depreciate, then highlight the item itself in the Items List (below the Line Item Entry pad).

3. In the line item entry pad, select the method of depreciation you want to use, then:
   - if you selected By $ or By %, type a number in the adjoining field to indicate the actual percentage or amount.
   - if you selected Age/Use, either type an age in the Age field, or select Normal, Heavy, Light, New, or Ins. Replaced in the Use field.

4. Specify whether you want this depreciation to be recoverable or non-recoverable.

5. Press Enter.

6. Repeat steps 2–6 for each room that contains the line item you want to depreciate.
   Xactimate adds depreciation to all line items selected.
TO CHANGE ESTIMATE PRICES OR PRICING ATTRIBUTES BY LINE ITEM
You are able to change a line item’s price from the Edit Unit Price window.

To do this, follow these steps:

1. From the Control Center Project window, highlight the estimate you want to change and click Open.

2. Click the Estimate Items tab.

3. Highlight the line item you want to edit.

4. Click on the Unit Price button.

The Edit Unit Price Information window appears, where you can change the attributes of an item’s price.

5. Click the [i] button from one of the displayed activities.

The Item Activity Information window appears.

Note: The unit price for a line item is sometimes divided into the Replace price and Remove price. You can click [i] to edit either of these fields.

The Item Activity Information window displays a definition of the activity as well as an illustration, and shows you a list of supporting events, assembly info, and the sales tax information of the item. In addition, you can modify the market conditions of the activity.

If you adjust a unit price for an item without adjusting the individual material, equipment, or labor price then the difference between the price list amount and your adjusted unit price will be displayed in the Market Conditions field in this window.

Note: Market conditions should only be used to adjust an item price in unusual circumstances. If the price of an item is different from the price in the price list, you should determine what specific components are responsible and change the prices for those components. This procedure ensures that the prices of all other affected items are automatically adjusted as well.

6. Make your changes, then click OK to close the Item Activity Information window, then click OK again to close the Edit Unit Price window. Click OK on the Line Item Entry pad.

Note: When you edit a unit price from the Edit Unit Price window, it is changed for this estimate only. You can make permanent pricing changes by editing the components of a line item in the Price List Editor.
TO CHANGE O&P FOR SPECIFIC ROOMS IN AN ESTIMATE
You can change overhead and profit (O&P) for specific rooms in an estimate without changing O&P in other rooms by using the Global Changes/Factoring feature in Xactimate. To do this,

1. From an estimate that has been sketched and scoped, click the **Estimate Items** tab.
   
   The **Estimate Items** window appears.

2. Click to highlight the rooms you want to change O&P for in the **Grouping** pane.
   
   You can hold the **Ctrl** key to select multiple rooms.

3. Right-click on one of the selected rooms and choose **Global Changes Wizard**.
   
   The **Global Changes Wizard** appears.

4. Click the **Make Changes to** drop-down and choose **Taxes/O&P/Repaired**.

5. If you want to make changes to all line items in all categories in the selected rooms, keep the **All** radio button selected.
   
   If you only want to change some categories, you can click the **Select** button and choose the categories you want to change.

6. In the **Other Global Changes** area, click **O&P** or **Non O&P**, depending on what you want.
   
   The **Do not Change** radio button is for when you have different changes to make and don’t want to change the line items’ O&P.

7. Click **OK**.
   
   Xactimate changes the O&P for all the rooms and categories selected.

TO CHANGE PRICING ATTRIBUTES FOR LINE ITEMS IN YOUR ESTIMATE
If you need to change the price attributes of your line item in an estimate, you can use the global changes feature.

1. From an estimate that has been sketched/dimensioned and scoped, click the **Estimate Items** tab.
   
   The **Estimate Items** window appears.

2. Click to highlight the rooms you want to change pricing attributes for in the **Grouping** pane.
   
   You can hold the **Ctrl** key to select multiple rooms.

3. Right-click on one of the selected rooms and choose **Global Changes Wizard**.
   
   The **Global Changes Wizard** appears.

4. Click the **Make Changes to** drop-down and choose one of the following types of attributes:
   
   - **Coverage**
   - **Factoring**
   - **Taxes/O&P/Repaired**
   - **Tags**
   - **Depreciation**
   - **Category/Selector**
5. Under *Categories* (you will see this section regardless of which attribute you select), either keep the **All** radio button selected, or click **Select** and then choose the categories you want to apply these changes to and click **OK** from the *Category SmartList*.

From this point, how you fill in the rest of the window depends on the option you selected in step 4.

- If you selected *Coverage*, select the coverage you are changing the selected items to (the options you have to choose from are dependent on what you selected in the Claim Info *Coverage/Loss page*).
- If you selected *Factoring*, enter the percentage you want to change each activity by selecting *Increase* or *Decrease* in the *Action* fields, and typing the percentage change in the *Factor By* fields.
- If you selected *Taxes/O&P/Repaired*, select one or more of the following:
  - Whether you want to display the price or a price note for selected items
  - Whether you want items to be taxable or exempt
  - Whether items should be O&P or non-O&P
  - Whether items will be handled by a contractor or the homeowner
- If you selected *Tags*, select whether you want to add, remove, or modify tags; then click the tag link and enter the tag you want to add/remove/modify.
- If you selected *Depreciation*, click **Depreciate by** and choose a percent, amount, or age/use; then select the depreciation type.
- If you selected *Category/Selector*, enter the category and selector that you want to change the selected items to be, then click to deselect the **Update life expectancies** checkbox if you want to leave the life expectancies of the current items as-is.

6. Click to place a checkmark in the **Pause and verify each item** checkbox if you want to see each item before Xactimate changes its price attributes.

7. Click **OK**.

   Xactimate begins the make the changes you requested. If you did not click the **Pause and verify each item** checkbox, then you are finished.

   If you did click the **Pause and verify each item** checkbox, then the *Changes—Pause and Verify* window appears.

8. Review the information in the *Changes—Pause and Verify* window, then make any additional last-minute changes you might want to make.

9. Click **OK** if you want to keep the proposed changes. If you decide to make additional changes, you can make them in this window, then click **OK**. If you decide you do not want to keep any of the changes, then click **Skip Item**.

10. Repeat steps 8–9 for each line item that appears.

When you have clicked **OK** or **Skip Item** for each line item that appears, you are finished.

**Note:** Profiles may be customized to meet the specific needs of a broad range of users. Depending on the profile you’re using, certain options mentioned may not be available.
**TO COPY A SCOPE FROM ONE ROOM TO OTHER ROOMS**

1. Click the *Estimate Items* tab within an estimate. On the *Grouping* list, click to highlight the room that contains the scope you want to copy.

2. Click and drag to highlight the items you want to copy (or use the *Control* key and click the mouse to highlight selected items).

3. Right-click anywhere on the highlighted items and select *Copy* on the menu that appears.

4. On the *Grouping* pane, click to highlight the room(s) you want to paste the scope into. Hold down the *Control* key to highlight multiple rooms.

5. On the *Grouping* pane, right-click on any of the rooms you just selected and choose *Paste* on the menu that appears.

6. If you selected multiple rooms, a window appears asking if you want to paste to all marked grouping members. Answer *Yes* if you want to paste the scope to all marked rooms.

See also:
“*To use the Retrieve Scope feature from Estimate Items*” on page 155.

**TO COPY AND PASTE LINE ITEMS INTO MULTIPLE ROOMS**

1. Go to the *Estimate Items* window within an estimate.

2. Highlight a room in *Grouping* that contains the line items you want to copy.

3. In *Line Item Entry*, highlight all the line items you want to copy.

4. Right-click on one of the highlighted items and select *Copy* from the menu that appears.

5. In *Grouping*, highlight all the rooms into which you want to paste the copied items.

6. Right-click on one of the highlighted rooms and select *Paste* from the menu that appears.

   The pasted line items will appear in all the selected rooms.

**TO CREATE A LINE ITEM MACRO**

1. From within an estimate’s *Estimate Items* window, add all of the items you want to include in the macro (see “*To enter line items in the Estimate Items window*” on page 148).

2. Highlight all of the items to be included in your macro.

3. Click the *Tools menu*, then choose *Save Macro*.

   The *Save Macro Information* window appears.

4. Enter a code and description name for the macro in the appropriate fields and press *OK*.

   A macro containing these line items has now been created and saved.

See also:
“*To use a macro*” on page 154
TO CREATE LINE ITEM ATTACHMENTS
When entering line items from the Estimate Items window, you may want to attach notes, images, or sound files to the estimate.

1. From within an estimate’s Estimate Items window, on the Grouping pane, click the room you want to add the attachment to.
2. In the Line Item Entry pad, click Attachments.
3. In the Attachments window, click the Attachment Type drop-down button and select the attachment type you want to create: Note, Image, or Sound File.
4. Make sure the Attach to previous item? checkbox is checked if you want this attachment linked to the previous item in the Line Item Entry pad.
5. Complete the fields associated with the attachment type you selected.
   - If you select Note, a Note editor appears. Type the note you want to appear in the Line Item Entry window and click OK. The Note Editor works much like a word processor.
   - If you select Image, click the File button to import a JPEG Image file (.jpg). Complete the remaining fields to accurately identify the picture for future reference and click OK.
   - If you select Sound File, click the File button to import a WAV Sound File (.wav). Complete the remaining fields and click OK. To play the sound file, click on it in the Line Item Entry window; an attachment window opens at the top of the Line Item Entry window. Click the Sound File button to listen to the sound file.

The line item attachments appear in the Estimate Items window after you click OK.

TO CREATE LINE ITEM NOTES
When entering line items from the Estimate Items window, you may want to add notes to the Line Item area of an estimate. You can attach these notes to a line item or have them independent of any line item.

1. On the Grouping pane of the Estimate Items window, click the room you want to add the note to.
2. In the Line Item Entry pad, click Attachments.
3. Make sure Note is the attachment type in the Attachments window.
4. Place a checkmark in the Internal Note checkbox if you do not want your clients/insured to see this note.
5. Make sure the Attach to previous item? checkbox is checked if you want this attachment linked to the previous item in the Line Item Entry pad.
6. If the Attach to previous item? checkbox is not marked, you can click the Coverage drop-down button to select a covering for the note.
7. Type the text of the note in the Note Editor (the large central window) and click OK.

The Note Editor works much like a word processor.

The note appears in the Estimate Items window after you click OK. You can highlight the note and make further edits if necessary.
TO DIMENSION A NEW ROOM USING THE DIMENSIONING MODULE
While most of your dimensioning will be done using Sketch, you can dimension a room using the classic Dimensioning module. Any rooms you dimension using the Dimensioning module must be created in Grouping. You cannot use the Dimensioning module to dimension rooms created using Sketch.

1. Click the Estimate Items tab from within an estimate.
2. Double-click the room you want to estimate in the upper left Grouping pane.
   The Group Info window appears.
3. Click Add.
   The Add Dimensioning window appears.
   **Note:** The main section is automatically given the same name you assigned to it in Grouping; subrooms need to be named separately. You can type a name directly into the first field of this window or use the attached SmartList.
4. Select the shape that matches the room (or the room’s largest segment) from the Shape drop-down.
   Most rooms are based on rectangles, so Box is the default shape.
5. Enter the dimensions in the fields below the graphic and click the OK button.
   The Add Dimensions window disappears and the dimensions for this room appear in the Dimension window.
   **Note:** If the dimensions do not appear right away, close the Group Info window and then open it again.
6. If the room has one or more additional subrooms, such as a closet or offset, click Add again.
   A new Dimensioning window appears for you to add the subroom information.
7. If this room has one or more missing walls, follow the instructions on missing walls on page 147.

TO ENTER A MISSING WALL IN DIMENSIONING
You can only add missing walls to rooms that have been created using Grouping and Dimensioning; you cannot add a missing wall to a room created in Sketch.

1. From within the estimate, click the Estimate Items tab.
2. In the Grouping pane, double-click the room you want to add a missing wall to.
   The Group Info window appears
3. Double-click the room (or sub-room) in the Group Info window.
   The Edit Dimensioning for [room] window appears.
4. Click the Missing Walls button.
   The Missing Walls for [room] SmartList appears.
5. Click Add from the Missing Wall SmartList.
   If you didn’t have any missing walls already in the Missing Wall SmartList, you don’t have to click Add; the Add Missing Wall Information for [room] window appears.
6. Enter the missing wall information. Keep in mind that Quantity means the number of missing walls with the same dimensions.

7. Click OK to close the Add Missing Wall Information for [room].

8. Click Add to add additional missing walls to this room, or click Close to return to the Dimensioning window.

**TO ENTER LINE ITEMS IN THE ESTIMATE ITEMS WINDOW**

To enter a line item,

1. From within an estimate’s Estimate Items window, highlight the room you want to add a line item to in the Grouping pane.

2. In the Line Item Entry pad (in the center of the window), click the Category SmartList button.

3. Highlight the category that contains the line item you’re entering and click OK.

4. Click the Selector SmartList button.

5. Highlight the specific line item you’re entering and click OK.

6. Check the defaults of the remaining fields. Make changes as needed, then click OK.

7. Repeat steps 2–6 until you have entered all of the items required for the selected room. Repeat the entire procedure as needed for all other rooms in the estimate.

If you have difficulty finding a price list item, there are several search methods available to help you locate the item and enter it. You can review how to use these search methods from within the Xactimate RTT.

- Reference Search
- Related-Item Search
- Similar-Item Search

For more information about the following fields or buttons on the line item entry pad, you can review them from within the Xactimate real-time training.

- Category
- Selector
- Activity
- Calculation
- Calculator
- Unit of Measure
- Unit Price
- Depreciation
- Miscellaneous Item

See also:

- “To copy and paste line items into multiple rooms” on page 145
- “To copy a scope from one room to other rooms” on page 145
- “To use a macro” on page 154
- “To use the Retrieve Scope feature from Estimate Items” on page 155
TO ENTER SUBROOMS AND MISSING WALLS

The Missing Walls feature makes the Dimensioning tools more versatile and precise. Most rooms can be fully dimensioned by entering subrooms and using the Missing Wall feature.

Note: Subrooms are entered after the main area of the room (subroom 0) has been dimensioned.

You can dimension rooms made up of several subrooms by subtracting missing walls from the area dimensioned. Missing walls must open into an area that has been dimensioned or to the room exterior.

To dimension a room using subrooms and missing walls,

1. From within the estimate, click the Estimate Items tab.
2. In the Grouping window, double-click the room you want to dimension.
3. Double-click the room in the Dimensioning pane to view the Add Dimensioning for [room]
4. If the room is rectangular, enter the dimensions for subroom 0.
   If the room is not rectangular, select the appropriate tool and enter the dimensions for subroom 0.
5. Click OK.
   Note: Missing walls in the first subroom are rare because missing walls must open into a subroom that is already dimensioned. One exception is when a missing wall opens into another room (not a subroom) or to the exterior of that room (i.e., a large window).
6. To enter a subroom, click Add in the Group Info window.
   The Add Dimensioning for [room] window appears.
7. Enter the name of the subroom in the Description field or choose a name from the attached SmartList.
   Note: Subrooms are tracked by number, as well as by the name you choose.
8. If the subroom is rectangular, enter the dimensions for subroom 1 (or subroom 2, etc.).
   If the subroom is not rectangular, select the appropriate tools and enter the dimensions for the subroom.
9. Click Missing Walls.
   The Missing Walls SmartList appears. If you have not entered any missing wall information yet, the Add Missing Wall Information window appears as well.
10. If you already have any missing wall information in the Missing Walls SmartList, click Add.
11. Enter the length and height of the missing wall.
    By default, the room length and room height is entered as the length and height of the missing wall.
12. Click the Opens Into drop-down button to select the subroom (or exterior) this subroom opens into.
13. Type the quantity of missing walls that fit this description.
14. Click the button that fits the description of the missing wall. You can choose from:
   - Open at neither top nor bottom.
   - Open at top.
   - Open at bottom.
   - Open at top and bottom.

   Note: If the height of the missing wall is the same as the height of the subroom it opens into, you can only choose Open at top and bottom. If the height is less than the height of the subroom it opens into, you cannot choose this option.

15. Click **OK** to close the Add Missing Wall Information window.

16. Click **Close** to close the Missing Walls SmartList.

17. Click **OK** to close the Add Dimensioning for [room] window.

18. Repeat steps 6–17 for each additional subroom you would like to add to this room.

**TO GROUP/SORT LINE ITEMS IN THE SUMMARY LIST**

You can arrange your estimate’s line items in the Summary List so that they’re arranged alphabetically, grouped by division, category, or trade.

To group/sort your line items in Summary,

1. Click the Estimate Items tab from within the estimate, then make sure the Items tab is selected.
   The Items page appears.

2. Click Summary List from the center of the window.
   The Summary Items window appears.

3. Click the Options drop-down button below the Summary edit pad.
   A drop-down menu appears.

4. Highlight Group By.
   The Group By sub-menu appears.

5. Click the grouping/sorting method you would like to use on your line items.
   - **Group by Category** groups each line item by its category (three-letter code at the beginning of its line item code).
   - **Group by Division** groups the line items by their CSI divisions.
   - **Group by Trade** groups the items by trade.
   - **Sort Alphabetically** lists each line item alphabetically by its line item code.
   You can now view the line items according to your needs.
TO MAKE SCENARIOS PERMANENT
When you make a scenario change to line items in an estimate (using the Item Scenario window), the change is temporary unless you mark it as permanent.

1. From any estimate window, click the Tools menu and choose Make Scenario Permanent.
   The Upgrade Scenarios window appears.

2. Highlight the scenario you want to make permanent (e.g., the scenario you want to use for this estimate).

3. Click OK.
   Xactimate puts a note with each line item to let you know how it has been affected.

TO RE-PRICE AN ESTIMATE

1. From within an estimate, click the Estimate menu, then choose Reprice.
   The Re-price Estimate(s) window appears.
   
   Note: You can also choose Re-Price from the Projects SmartList Option button.

2. Click the appropriate checkboxes to re-price XactContents items (MIL items) and/or price list items.

3. If you are re-pricing price list items, select the price list you want to use to re-price.

4. Click the appropriate radio button to tell Xactimate what to do when an item’s price differs from the price list.

5. Click the appropriate radio button to tell Xactimate what to do when an item’s description differs from the price list.

6. Click the appropriate radio button to tell Xactimate what to do when an item does not exist in the price list.

7. Click OK to close the Re-price Estimate(s) window.

8. Click OK in the window that tells Xactimate to continue re-pricing.

9. Select the option you want—Get from Price List, Re-price item, Skip item, or Abort—each time the Re-pricing with Price List or Item not found window appears.

10. Click OK to close the Reprice Summary SmartList when the repricing is finished.

TO SCOPE A PROJECT USING QUICK ENTRY
The Quick Entry function is a quick, easy method for entering line items when you already know most of the codes.

To use Quick Entry,

1. Open the estimate you want to scope and make sure it has been dimensioned.

2. Click the Estimate Items tab.
   The Estimate Items window appears.

3. From the Grouping pane, click a room you want to add line items to.

4. Click the Quick Entry tab from the Line Item Entry pad.
   The Line Item Entry area changes to become the Quick Entry area.
5. Type the category code of the first line item you are entering.
   If you are unsure of the available category codes, click the drop-down button to choose a category.
   After you’ve entered the category code, the highlight immediately moves to the Selector field.

6. Type the selector code for the line item, then press the Tab key on your keyboard.
   If you are unsure of the exact selector code, click the drop-down button to choose a selector code.
   If you anticipate keeping all the defaults for this line item, click Enter instead of Tab to move to the next line. Skip to step 9.

7. Click Tab to move between each field, changing any fields necessary.

8. When you’ve finished this line item, press Enter on your keyboard.
   Xactimate begins a blank new line.

9. Repeat steps 5–8 until you have all necessary line items added to this room in the estimate.

TO SEARCH FOR A CONTENTS ITEM USING QUICK ENTRY

1. Open the estimate you want to add content items to.

2. Click the Estimate Items tab.
   The Estimate Items window appears.

3. From the Grouping pane, click a room you want to add content items to.

4. Press Control+Q on your keyboard.
   The Line Item Entry area changes to become the Quick Entry area.

5. Type the category code of the first line item you are entering.
   If you are unsure of the available category codes, press F5 on your keyboard to see a list of categories to choose from. Press the arrow keys to enter it into the Cat/Dept field.
   After you’ve entered the category code, the highlight immediately moves to the Selector field.

6. Type MISC, then press Tab twice.
   The Description field should be highlighted.

7. Type a short description of the item you’re adding, then press Tab.
   The Search icon [ ] is highlighted.

8. Press Space on your keyboard.

9. In the Search pane, click a link to see the contents items located at that source.
   If you click one of the Xactware Sources links, Xactimate displays a list of items that fit the description you entered.
   If you click one of the Internet sources, Xactimate opens your web browser and takes you to that company’s shopping website.

10. Scroll through the list to find the item you want to add, then double-click on it.
    Xactimate adds the line item, then begins a new line for additional items.
**TO SHOW GROUP FOOTERS IN THE SUMMARY LIST**

When your estimate’s line items are grouped by division or category in Summary, you can choose to view a sub-total for each grouping. This sub-total is called the group footer.

To view your group footers in Summary,

1. Click the Estimate Items tab from within the estimate, then make sure the Items tab is selected. The *Items* page appears.
2. Click **Summary List** from the center of the window. The *Summary Items* window appears.
3. Click the **Options drop-down button** at the top of the *Summary List*. A drop-down menu appears.
4. Click **Show Group Footer** so that it has a checkmark by it. If **Show Group Footer** already has a checkmark by it, clicking on this selection turns off the group footers.
   
   **Note:** You cannot show the group footer if your categories are grouped alphabetically.

You can now view the sub-total for each group in Summary.

**TO TURN OFF BASE SERVICE CHARGES**

To turn off base service charges for a single estimate only,

1. Open the estimate you are turning off base service charges for.
2. Click the **Estimate Items** tab. The *Items* page appears.
3. Click the **Base Service Charge** tab. The *Base Service Charges List* appears.
4. Right-click anywhere within the list and choose **Select All**. The entire *Base Service Charges* list is highlighted.
5. Right-click again and select **Do Not Apply Base Service Charges**. The base service charges for this estimate have now been turned off.

You can use this method to turn off some of the base service charges without turning off all of them, or to factor base service charges into unit costs for some or all trades.
TO TURN OVERHEAD & PROFIT ON OR OFF FOR INDIVIDUAL LINE ITEMS

In order to calculate O&P on an individual line item, you must turn on O&P in the Edit Unit Price Information window. If you don’t want to calculate O&P on an individual line item, you must turn on the Non-O&P option instead.

*Note: In order to calculate O&P, you must enter a default percentage in the Overhead and Profit fields on the Add-ons section of the Parameters window.*

1. From within your estimate, click the Estimate Items tab.
2. On the Estimate Items window, highlight one of your items.
3. After highlighting your item, click on the Edit Unit Price button.

In the Edit Unit Price Information window, you are allowed to include Overhead and Profit in the totals of your printed estimate. If the setting you choose here is different from your default O&P setting (the one you set up on the Parameters page), the choice you make here overrides the default.

4. To calculate O&P for this particular line item, click the O&P radio button.
   To exclude O&P for this item’s final, printed total, click the Non-O&P radio button.
5. Click the OK button to close the Edit Unit Price Information window.
6. Click the OK button to save the changes on your Line Item Entry pad.

TO USE A MACRO

1. From within the estimate, click the Estimate Items tab.
   This estimate must already have rooms created for it.
2. Highlight the rooms you want to apply the macro to.
   You can select multiple rooms by holding the Control key while clicking each room.
3. Click the Tools menu and choose Retrieve Macro to see the Macro SmartList.
4. Highlight the macro you want to apply to the rooms.
5. Click OK.
   The line items from the macro have now been applied to the room(s). Items using variables and subvariables are automatically adjusted to the new room dimensions.
6. Go to each room and fine-tune the macro to your estimating needs.
   Line items that do not contain variables in the Calculation field should be carefully reviewed for accuracy.

See also:
“To create a line item macro” on page 145
“To create a macro in Sketch” on page 209
“To use a macro in Sketch” on page 221
To use the Retrieve Scope feature from Estimate Items

The Retrieve Scope feature can save you time when you realize, for example, that the master bedroom and NE bedroom have the same scope.

Even though their dimensions are different, you can quickly copy the master bedroom scope to the NE bedroom. All items that use variables are automatically recalculated to match the new room’s dimensions.

To retrieve a scope from one room and copy it into another room:

1. From within an estimate’s Estimate Items window, on the Grouping pane, click to highlight the room you want to copy the scope into.

   To make sure the Line Item Entry window for the room you just selected in the Grouping pane is active, click your mouse somewhere inside of the Line Item Entry window.

2. Click within the Line Item List area, then select Retrieve Scope from the Edit menu.

   The Retrieve Scope window appears, listing each room in your estimate.

3. Locate the room that has the scope you want to retrieve and choose OK.

   Xactimate copies the scope into the current room.

   If a room hasn’t been dimensioned, Xactimate warns you that line items brought into that room have a calculation of zero.

   If a duplicate item is found when the scope is copied, Xactimate gives you the option of adding the item, skipping it, modifying the duplicate, or aborting the scope retrieval.

See also:
“To copy a scope from one room to other rooms” on page 145

To verify the phase assigned to a line item during a transfer to Master Builder

You may need to know the phase assigned to a line item if the line item’s selector code has been modified before exporting it to Master Builder.

To do this, follow these steps:

1. From within the estimate you want to change, click the Estimate Items tab.

2. Highlight the line item you want to edit.

3. From the Line Item Entry pad, click the Edit Unit Price button.

   The Edit Unit Price Information window appears.
4. Click the [I] next to the item's replace price.

   The phase appears in the upper right corner of the *Item Activity Information* window.
   
   If the phase is incorrect or blank, delete and re-enter the line item from the Estimate Item window so the appropriate phase is assigned.

   *When you enter items that do not exist in the price list, make sure to use a miscellaneous line item instead of modifying the selector code for an existing line item if you want your phases to remain consistent.*
ESTIMATES
The Estimates section helps you understand the following basics about estimates in general:

To add annotations to graphics in your estimates (page 157)

To attach an image to your estimate (page 157)

To copy data from another estimate (page 158)

To create an estimate from start to finish (page 158)

To re-price an estimate (page 159)

To save an estimate (page 159)

To save and exit an estimate (page 159)

TO ADD ANNOTATIONS TO GRAPHICS IN YOUR ESTIMATES
Xactimate allows you to add notes, lines, circles, and other annotations to your graphics without altering the original graphic image file.

To annotate a graphic,

1. Open the estimate that contains the graphic you want to annotate.

2. Click the Images tab from near the upper right corner.

   The Digital Images window appears.

3. Click the graphic you want to annotate from the Images pane on the left side of the Digital Images window, then click the Annotate button.

   The Image Annotation window appears.

4. Make the necessary annotations to this graphic.

   Note: See the Image Annotation Window help topic in the Xactimate RTT for information on how to use the annotation tools.

5. Once you’ve finished making annotations, click OK.

   Xactimate closes the Image Annotation window and returns to the Digital Images window.

6. Click OK.

   Xactimate closes the Digital Images window.

See also:
To attach an image to your estimate (page 157)

TO ATTACH AN IMAGE TO YOUR ESTIMATE
You can attach a number of images to your estimate, such as photographs and pencil sketches and anything else you think may be necessary to you estimate. You can also add notations to each image.

To add an image to your estimate,

1. Open the estimate you are adding graphics to.

2. Click the Window menu, then choose Images (or simply click Images near the upper right corner).

   The Digital Images window appears.
3. Click the **Load Images** button from near the lower right corner.

   The *Select Images* window appears.

4. Browse through your hard drive (or network) to select the graphic image you want to attach to the estimate, then click **Open**.

   The image you selected appears as the main portion of the window.

5. Type the name you want to use for this graphic in the *Image Name* field, then type any text you want to use to describe the graphic in the *Description* field.

   Do not press your *Enter* key at this time.

6. Click the rotate or annotation buttons to either rotate the graphic or to add annotations to it.

7. Repeat steps 3–6 until you have all graphics you want included with this estimate.

8. Click **OK**.

   The *Digital Images* window closes. You can now print these images with your reports, or add them to specific locations on your Sketch floor plan.

See also:

*To add annotations to graphics in your estimates (page 157)*

*To add graphics to your Sketch (page 203)*

**TO COPY DATA FROM ANOTHER ESTIMATE**

Xactimate allows you to copy data from one estimate to another, including information on the insured, sketches, line items, parameters, etc.

1. Create a new estimate that you will copy the data into.

2. Click the **Estimate** menu and choose **Copy From Project**.

3. Click the **Project to copy from SmartList** button and select the project you want to copy data from.

4. Place a checkmark next to each estimating module you want to copy into this estimate.

   For example, you might want to copy the scope from one estimate that uses the same floor plan, but not select the Insured Info since the insured is a different person.

   *Note: If you need to an estimate’s sketch but not line items, you can always delete any extra data you copied.*

5. Click **Copy**.

   The selected data is copied into the new estimate.

**TO CREATE AN ESTIMATE FROM START TO FINISH**

Click the **Projects** tab in the Control Center. Click the **Add** button and enter your project name, then click **OK**.

There are four estimating windows: *Claim Info, Sketch, Estimate Items,* and *Complete.*

1. Click the **Claim Info** tab to enter administrative data on the insured, the property, the estimate itself, and the job.

   - You must fill in most of the fields in the Insured Info, Coverage/Loss, and Parameters windows.

   - You can choose to enter information in the Loss Recap and Activity Report windows, as well as view reports from the Claim Reports window.
2. Click the **Sketch** tab. Create your Sketch drawing first, then use graphical estimation to add the correct price list item.

3. Click the **Estimate Items** tab to enter any line items you don’t add in Sketch.

4. Click the **Complete** tab to see where you might have missed important information and then mark your estimate as complete.

**TO RE-PRICE AN ESTIMATE**

1. From within an estimate, click the **Estimate** menu, then choose **Reprice**.
   
   **Note:** You can also choose Re-Price from the Projects SmartList Option button.
   
   The **Re-price Estimate(s)** window appears.

2. Click the appropriate checkboxes to re-price XactContents items and/or price list items.

3. If you are re-pricing price list items, select the price list you want to use to re-price.

4. Click the appropriate radio button to tell Xactimate what to do when an item’s price differs from the price list.

5. Click the appropriate radio button to tell Xactimate what to do when an item’s description differs from the price list.

6. Click the appropriate radio button to tell Xactimate what to do when an item does not exist in the price list.

7. Click **OK** to close the **Re-price Estimate(s)** window.

8. Click **OK** in the window that appears to tell Xactimate to continue re-pricing.

9. Select the option you want—**Get from Price List**, **Re-price item**, **Skip item**, or **Abort**—each time the **Re-pricing with Price List or Item not found** window appears.

10. Click **OK** to close the **Reprice Summary SmartList** when the repricing is finished.

**TO SAVE AN ESTIMATE**

You can save your estimate at any time by choosing **Save** from the **Estimate** menu within an estimate.

To save and exit your estimate, choose the **Save and Exit** button.

**TO SAVE AND EXIT AN ESTIMATE**

1. From within an estimate, click the **Save and Exit** button in the upper right corner of the window.

   The active estimate is saved and you are returned to the **Projects SmartList**.
**Price Lists**

This section helps you understand some of the things you can do with price lists in Xactimate:

| ▲ To add an assembly item (page 160) | ▲ To add a component/supporting event to price list items (page 161) |
| ▲ To add custom graphics to a price list (page 162) | ▲ To add an item to a price list (page 163) |
| ▲ To add a labor burden tax (page 164) | ▲ To add a price list (page 164) |
| ▲ To add a price list category (page 165) | ▲ To add a price list component (page 165) |
| ▲ To add a price list item (page 166) | ▲ To add a sales tax (page 166) |
| ▲ To add a supporting event (page 168) | ▲ To compare and merge price lists (page 169) |
| ▲ To delete a category (page 171) | ▲ To delete a labor burden tax (page 171) |
| ▲ To delete a price list (page 172) | ▲ To delete a price list component (page 172) |
| ▲ To delete a price list item (page 173) | ▲ To delete a sales tax (page 173) |
| ▲ To download a price list (page 173) | ▲ To duplicate a price list (page 174) |
| ▲ To duplicate a price list component (page 174) | ▲ To duplicate a price list item (page 175) |
| ▲ To duplicate a price list supporting event (page 176) | ▲ To duplicate supporting events for retail labor (page 176) |
| ▲ To edit a fringe benefit (page 177) | ▲ To edit a labor burden tax (page 177) |
| ▲ To edit a price list category (page 178) | ▲ To edit a price list component (page 178) |
| ▲ To edit a price list item (page 179) | ▲ To edit a sales tax (page 179) |
| ▲ To edit a supporting event (page 180) | ▲ To edit supporting events for retail labor (page 180) |
| ▲ To edit workers compensation (page 181) | ▲ To filter price lists (page 181) |
| ▲ To print price list reports (page 182) | ▲ To rename a price list (page 183) |
| ▲ To retrieve a price list (page 183) |

**To Add an Assembly Item**

An assembly item is simply the breakdown of individual components used in a line item.

1. From the Control Center, click the **Price List** tab.
   
   The *Price List SmartList* appears.

2. Highlight the price list that contains the item you want to edit, then click **Open**.
   
   The *Price List Editor* appears.

3. Click the [+] next to **Items**.

4. Click the [+] next to the category that contains the price list item you want to edit.
5. Click the price list item you want to add an assembly item to.

6. In the Activity Price Table, click the activity that you want to add the assembly item to, then click Edit.

7. Click the Add button near the top of the window.

8. From the Assembly Info tab, click the Type drop-down button to select the type you’re creating.
   You can choose from Equipment (EQU), Material (MAT), or Retail Labor (RLB).

9. Click the Component Code drop-down button and select the appropriate component code from the list.
   Note that as you do this, the component price and description appear under the Type field.

10. Enter a number into the Direct Yield field.
    The Direct Yield field is designed to answer the question: how many units of the subject price list item can be completed with one unit of this assembly item? For example; how many square feet of drywall can be completed with one box of drywall screws? Or how many square feet of drywall can be completed in one hour of a drywall installer’s labor? You can use the SmartCalculator to help calculate this amount.

11. If necessary, assign a supporting event to this assembly item by clicking the Supporting Events drop-down button.
    A supporting event will have the effect of reducing the actual yield by a specified percent.

12. Review the bottom portion of the window to make sure the calculations looks reasonable.
    If they don’t, check your input and make any necessary corrections.

13. Choose Save or Save and Exit from the File menu to save this new assembly item to the line item’s Assembly Item table.

You can also add assembly items to a line item directly in the estimate from the Item Activity Information window. If you do this, start with step 7.

TO ADD A COMPONENT/SUPPORTING EVENT TO PRICE LIST ITEMS
To add a component and/or supporting event to a price list item,

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Highlight the price list that contains the item you want to edit, then click Open.
   The Price List Editor appears.

3. Click the [+] next to Items.

4. Click the [+] next to the category that contains the price list item you want to edit.

5. Click the price list item you want to add a component to.
6. Click the activity tab at the top of the Items page to select the activity for the component you’re adding.
   You can choose Replace, Remove, or Detach & Reset.
   
   **Note:** If the activity you want to add a component to does not exist, click the Add button at the top of the activity’s page.

7. Click the Add button from just below the Assembly Item Table.
   The Assembly Info page appears.

8. Click the **Type drop-down button** to choose the correct type (material, labor, equipment) of component.

9. Click the **Component Code drop-down button** to choose the component you’re adding to this price list item.
   The rest of the Assembly Info fields are filled with the data that accompanies the component you selected.

10. Click the Supporting Events drop-down button to choose the supporting event associated with this component.

11. Make any other changes necessary to the rest of the fields in the Assembly Info page.
    When you save and close the Price List Editor, any estimates you open afterwards will reflect the changes you’ve made.

**TO ADD CUSTOM GRAPHICS TO A PRICE LIST**
Xactimate allows you to add a number of custom graphics (.jpg files only) to your price lists, either as replacements for default graphics or as new graphics. Since graphics tend to take up quite a lot of RAM, you can add no more than 100 custom graphics to a price list.

To add a graphic to a price list,

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Select the price list you want to add a graphic to, and click Open.
   The Price List Editor appears.

3. Click the [+] next to Items in the navigation tree.
   The Price List Editor displays the categories contained within the price list.

4. Click the [+] next to category that contains the item you want to create.
   The Price List Editor displays the items within the selected category.

5. Click the item you want to add a graphic to.
   The item’s Main page appears.

6. In the lower half of the page, click the Graphic tab (next to the Activity Price Table tab).
7. Click the **Use Custom Graphic** radio button, then click the **Custom Graphic drop-down button** and choose `<F5> SmartList`.

   The *Digital Images* window appears, containing all the custom graphics that have been added to this price list. This is the same basic window you use to add graphics to an estimate.

   **Note:** *If there are no other customized graphics in this price list, the Digital Images window appears as soon as you click the Use Custom Graphic radio button.*

8. Click **Load Images**.

   The Windows *Select Images* window appears.

9. Browse through your hard drive to find the graphic you want to add, then highlight it and click **Open**.

   The graphic appears in your *Digital Images* window.

10. Click **OK**.

    If you only have one custom graphic in your price list, this graphic will appear as this item's graphic. If you have more than one graphic, continue to step 11.

11. Click the **Custom Graphic drop-down button** and choose the graphic you want to use as a default for this price list item.

    Xactimate adds the graphic to the price list as the default graphic for this item.

12. Click **File** and choose **Save & Exit** (or simply choose **Save** if you want add graphics to additional price list items).

**TO ADD AN ITEM TO A PRICE LIST**

To add a new item to a price list,

1. From the Control Center, click the **Price List** tab.

   The *Price List SmartList* appears.

2. Highlight the price list you want to add an item to and click **Open**.

   The *Price List Editor* appears.

3. Click the `[+]` next to **Items** in the navigation tree.

   The *Price List Editor* displays the categories contained within the price list.

4. Right-click the category you want to add a price list item to and choose **Attach Item**.

   A blank item window appears to the right of the navigation tree and a space for this item is placed under the category in the navigation tree.

5. Select the new item’s category from the **Category** drop-down list.

   The category you selected in step 4 is listed first by default.

6. Type a selector code in the **Selector** field.

   As soon as you begin typing, the rest of the fields become active and filled with the defaults.

7. Select a default activity from the **Default Activity drop-down list**.

8. Type a description for the new item.
9. Continue entering the correct information (price attributes, calculation, etc.) for this price list item, or accept the defaults already entered.

10. Double-click each activity in the Activity Price Table to enter the description and assembly items for each activity for this price list item.
    This includes assembly items, definitions, quality, equipment, market conditions, etc.

11. When you’ve finished entering all the necessary information for this item, choose Save or Save and Exit from the File menu.

   The price list item is now ready to be used in your estimates.

**TO ADD A LABOR BURDEN TAX**

To add a labor burden tax,

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Highlight the price list you want to add a tax to and click Open.
   The Price List Editor appears.

3. Click Burden Taxes, located under Taxes in the navigation tree on the left.
   The Burden Taxes window appears.

4. Click the Add button on the upper-right side of the window.
   A line for a new tax appears in the Global labor burden sub-window.

5. Type the name of the new tax into the Type column.

6. Type the rate of the new tax into the % Rate field.

7. Click the File menu and choose Save or Save and Exit.
   The tax is now ready to be used in your estimates.

**TO ADD A PRICE LIST**

Since a price list contains many thousands of items, we suggest that rather than create a new one from scratch, you consider using an existing list as a template with the Duplicate price list feature (see "To duplicate a price list" on page 174).

1. From the Control Center, click the Price Lists tab.
   The Price List SmartList appears.

2. Click the Add button.
   The Price List Name window appears.

3. Enter the name of the new price list and click OK.
   The Price List Editor appears.

4. Add all of the categories and price list items to complete the list.
**TO ADD A PRICE LIST CATEGORY**

To add a price list category,

1. From the Control Center, click the **Price Lists** tab.
   
   The **Price List SmartList** appears.

2. Select the price list you want to add a category to and click **Open**.
   
   The **Price List Editor** appears.

3. Click **Categories** on the navigation tree to the left.
   
   The list of categories appears in the window on the right.

4. Click the **Add** button.
   
   The category code **CAT** appears in the category list, and blank detail for this category appears at the bottom of the **Price List Editor**.

5. Type the new category code in place of **CAT** in the middle of the window.

6. Enter the rest of the category information in the fields provided.

7. Click the **File** menu and choose **Save** or **Save and Exit** to save the new category to the price list.

**TO ADD A PRICE LIST COMPONENT**

1. From the Control Center, click the **Price Lists** tab.
   
   The **Price List SmartList** appears.

2. Select the price list you want to add a component to and click **Open**.
   
   The **Price List Editor** appears.

3. Click **Components** on the navigation tree to the left, then click the type of component you are adding.

4. Click the **Add** button.
   
   The component code **NEWCMP** appears in the component list and blank detail for this component appears at the bottom of the **Price List Editor**.

5. Type the new component code in place of **NEWCMP** at the bottom of the window.

6. Enter the rest of the component information in the fields provided.

7. Click the **File** menu and choose **Save** to save the new component to the price list.
TO ADD A PRICE LIST ITEM
We strongly recommend that rather than using the add procedure (described below), you select an existing price list item that’s similar to the one you want to create and use it as a template by using the duplicate feature (see “To duplicate a price list item” on page 175).

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Select the price list you want to add an item to, and click Open.
   The Price List Editor appears.

3. Click the [+] next to Items in the navigation tree.
   The Price List Editor displays the categories contained within the price list.

4. Click the [+] next to category that will contain the item you want to create.
   The Price List Editor displays the items within the selected category.

5. Right-click on any item and choose Insert Item.
   A blank item is added to the bottom of that category’s item list.

6. Click the Category drop-down list button and select a category you’re adding this item to.

7. Enter the remaining item information (include the Main, Replace, Remove, and Detach & Reset pages as necessary) then choose Save and Exit from the File menu.

TO ADD A SALES TAX

1. From the Control Center, click the Price Lists tab.
   The Price List SmartList appears.

2. Select the price list you want to add a sales tax to and click Open.
   The Price List Editor appears.

3. Click Taxes in the navigation bar, then click Sales Taxes.
   The Sales Tax Jurisdiction List appears.

4. Click Add from the Jurisdictions area.
   New Jurisdiction appears.

5. Highlight New Jurisdiction and type a new name for the jurisdiction.

6. Click to place a checkmark in the checkbox if you want this jurisdiction to be the default for this price list.

7. If you work in a state that requires more than one job type you would like to apply this jurisdiction to,
   a. Click Job Types.
      The Tax Job Type window appears with all fields grayed out.
   b. Click the Use multiple tax rates checkbox.
      The fields below become active.
   c. Type the name of the first job type into the First Tax Rate Name field.
d. Type the name of the second job type into the Second Tax Rate Name field.

e. Click OK.

In the Taxes area:

8. Enter a descriptive name for this tax in the Type field.

9. If this tax is calculated based on a percent, enter that percent in the Rate field.

10. Click the Base field’s Calculator button. Click the Functions button to choose the portion of the estimate you want to apply this tax to.

In most cases, you will want to select Total to apply the tax to the entire estimate.

The choices available in Functions let you select variables to use as the taxable amount. For example, choose Material to apply this tax to the total for materials in the estimate, or choose Material and type (“DRY,FCC”) to apply this tax to the cost of materials for the drywall and floor covering categories.

11. Click the Tax Type drop-down button to select whether Overhead and Profit (O&P) is to be taxed or computed on this tax (or neither).

12. If this tax is to be used in the calculation of another tax in the same jurisdiction, type a name in the Result field.

This name can be used as a variable in the Base calculation for another tax.

13. Click the Exception drop-down button to select the items that are exceptions to the tax you are creating.

The Exception is made up of two different filters: The exception items define the items that are being (or not being) taxed, and the exception itself defines how the exception items are being taxed.

To create exceptions,

a. Click the View/Edit Exceptions button (or click Exceptions from the Navigation Tree).

The Exceptions window appears.

b. Click the Add button.

c. Type the name of the exception.

A valid name might be Cleaning Excluded or Cleaning Included, depending on whether you wanted to include or exclude cleaning items. You may want to create an exclusion for both.

d. Select the Tax Default drop-down to select whether you want this exception to be taxable or non-taxable.

e. Click the Exception Items drop-down to select the exception list you are applying

If you don’t have the correct exception list already created, you can create one now:

i. Click Exception Items from the Navigation Tree (or click the View Exception Items link from the rule you are creating).

The Exception Items window appears.

ii. Click the Add button.

iii. Type a name for the exception in the Exception Name area.

iv. Click the Category drop-down to select the first category with items contained in the exception.

You can now enter rules for the exception item:
v. If you want specific items from this category to be included or not included in this list, click the Selectors drop-down and choose In List or Not In List; if you want the entire category to be included or not included, keep All selected. Skip to step vii if you kept All in the Selectors field.

vi. Type the selector codes of the line items in the Selector List, using a comma but not space between each code included in the category.

vii. Click Add Rule if you have additional line item categories and repeat steps iv–vi.

viii. Click the File menu and choose Save.

ix. Repeat steps ii–viii if you have additional exception items you want to add.

When finished creating the exception items you need, return to the Exceptions window and add them to the exception.

f. Click the Taxable Type drop-down to select the conditions under which the exception items are taxable.

   If you selected Not Taxable, skip to step i.

  g. Enter the amount above which the exception needs to be taxed. The exception will not be taxed if it is below this amount.

  h. Click the Full or Excess Taxable drop-down to select whether the entire amount is taxed, or whether the amount above the Taxable Only if Greater than field is being taxed.

  i. Click the File menu and choose Save.

  j. Repeat steps b–i for any additional exceptions you want to create.

When finished creating the exceptions you need, return to the Sales Taxes window and add it to the tax.

14. Click the Save and Exit button if you have no other tax types to create; otherwise, continue to step 15.

The Price List Editor closes. You can use this new tax for any estimates.

15. If you have additional taxes to add to this jurisdiction, click the Add button from the Taxes area.

   A line for a new tax line appears.

16. If the Order field is not important to the tax, then repeat steps 8–14. Otherwise, continue with step 17.

17. Make sure the tax type that needs to be calculated first has a lower number than the other tax type in the Order field.

   This is needed in order to correctly calculate the base for the tax type with the higher order number.

18. Repeat steps 8–14 to finish creating this tax type.

TO ADD A SUPPORTING EVENT

You can add a supporting event by following these steps:

1. From the Control Center, click the Price Lists tab.

   The Price List SmartList appears.

2. Select the price list you want to add a sales tax to and click Open.

   The Price List Editor appears.

3. Click Material, Labor, or Equipment under Supporting Events in the Price List Editor navigator.
4. Click the **Add** button to the right of the **Supporting Events** window.

   A new supporting event called **NEWSPT** appears.

5. Highlight **NEWSPT** and type the new code of the new supporting event.

6. Highlight the description field and type a description of the new supporting event.

7. Highlight the **Percent** field and type the percentage of the new supporting event.

You can now add this supporting event to a component of a price list item.

**TO COMPARE AND MERGE PRICE LISTS**

The Compare/Merge Price Lists wizard lets you evaluate the differences between two price lists as you merge them.

1. From the Control Center, click the **Price Lists** tab.

   The **Price List** window appears.

2. Click **Compare/Merge** from the top right of the Price List window.

   The **Price List Compare/Merge Wizard** appears.

3. Click **Next**.

4. Click the **Source Price List** drop-down button to select the first price list you will be comparing/merging.

   Xactimate will not change this price list under any circumstances.

5. Click the **Target Price List** drop-down button to select the second price list you will be comparing/merging.

   You can elect to merge the changes into this price list or to leave both price lists untouched, depending on the selections you choose in step 7.

6. Under **Select Labor Efficiency**, select the labor efficiency you want to view when comparing items.

7. Under **Merge Into**, choose whether you want to merge both price lists into the target price list (this is the price list you selected in step 5) or to create a brand new price list, consisting of both merged price lists.

   If you select the second option, neither the source price list nor the target price list will be changed.

8. If you selected **New Price List** in step 7, type the name of the new price list, and—if your Xactimate contains multiple profiles—click the drop-down button to select the profile this price list will be entered into.

9. Click **Automatic Merge** if you want to keep all the Compare/Merge Wizard defaults and simply merge the two price lists as they are. Otherwise, click **Next** and continue with step 10.

   If you clicked **Automatic Merge**, then Xactimate merges the two prices lists. You are finished.

   If you clicked **Next**, the **Preferences** window appears.

10. Make your selection from the following options:

    - **Update Burden**: lets you set the options that determine exactly how labor burden rates will be processed and updated. You can choose:
      
      - Automatically (without review) provides no verification of changes on the labor burden level, it results in all labor burden amounts being updated automatically.
– With Manual review provides that you verify and accept each change before it is made.
– Update Labor Rates lets you decide whether to update your existing labor rates based on the new data.
– Maintain Labor Rates lets you leave your rates unchanged and includes any differences in overhead.

**Update Components:** lets you set the options that determine exactly how component prices will be processed and updated. You can choose:
– Automatically (without review) provides no verification of changes on the component level, it results in all component amounts being updated automatically.
– With Manual review provides that you verify and accept each change before it is made.
– Update Unit Prices lets you decide whether to update your existing components based on the new data.
– Maintain labor rates lets you leave your rates unchanged and includes any differences in market conditions.

If you choose to update components, you can also update and merge material SKU data, or overwrite it.

**Update Supporting Events:** lets you set the options that determine exactly how supporting events will be processed and updated. You can choose:
– Automatically (without review) provides no verification of changes on the supporting event level, it results in all supporting events being updated automatically.
– With Manual review provides that you verify and accept each change before it is made.
– Update Unit Prices lets you decide whether to update your existing unit prices based on the new supporting events data.
– Maintain labor rates lets you leave your rates unchanged and includes any differences in market conditions.

**Update Items:** displays any and all differences between items, including calculation, description, unit of measure (unit), assemblies, prices, definitions/graphics, default activity, and pricing attributes. You can choose to compare all of these differences or only the specific differences you're interested in. You can also choose to merge these differences:
– Automatically (without review) provides no verification of changes on the supporting event level, and results in all selected differences being updated automatically.
– With manual review provides that you verify and accept each change before it is made.
– Enter a percentage to use as a threshold for the merge process.

For example, if you enter 10 in the *Display all items w/unit price differences* field, Xactimate automatically replaces any items in the Target price list that are less than ten percent different from the items in the Source price list. For items with differences equal to or greater than the percent difference you specify, you will need to evaluate whether or not to merge on a case-by-case basis. (You can disable this feature by entering 0 in this field.)

**Update Sales Taxes:** updates the item’s sales taxes.

**Show Target Items Not in Source:** displays all items that do not appear in the source price list if they do appear in the target price list.

**Merge All Custom Graphics:** merges the custom graphics that have been added to either/both of the price lists.
11. Click Next.

Xactimate runs the Compare/Merge wizard. If you selected Automatic in the Preference pages, or there weren’t any significant differences (as you defined them on the Preferences window) between the two price lists, Xactimate closes the wizard as soon as it is finished running, and you are finished.

If you set the wizard so that you could manually review the comparisons, or the differences between the two price lists were significant enough for Xactimate to flag, one or more Comparison Results windows will appear.

12. From the Comparison Results window, click on any link to either view (compare) the price list items or automatically merge them.

Viewing the price list results allows you to merge them individually or skip the merge process. If you don’t merge the items, the information from the target price list is used alone.

13. Click Next.

14. Repeat steps 12–13 until you’ve gone through all sections of the price list.

15. Click Finish.

The Price List Compare/Merge wizard disappears and the new price list appears in the Price List SmartList.

TO DELETE A CATEGORY

1. From the Control Center, click the Price List tab.

The Price List SmartList appears.

2. Select the price list that contains the category you want to delete and click Open.

The Price List Editor appears.

3. Click Categories from the navigation tree at the left of the Price List Editor.

4. Highlight the category you want to delete in the categories list.

5. Click the Delete button.

The category is deleted.

6. Click the File menu and choose Save or Save & Exit.

The category is permanently deleted from the price list.

TO DELETE A LABOR BURDEN TAX

1. From the Control Center, click the Price List tab.

The Price List SmartList appears.

2. Highlight the price list you want to delete a tax from and click Open.

The Price List Editor appears.

3. Click Burden Taxes, located under Taxes in the navigation tree on the left.

The Burden Taxes window appears.
4. Highlight the tax you want to delete from the Global labor burden sub-window and click Delete.

The tax is deleted from the price list.

Note: Do not click this button unless you are sure you want to delete this tax.

TO DELETE A PRICE LIST

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Select the price list you want to delete.

3. Click Delete.
   A confirmation window asks if you’re sure.

4. Click Yes.

TO DELETE A PRICE LIST COMPONENT

To delete a price list component,

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Select the price list in which you want to delete a component and click Open.
   The Price List Editor appears.

3. Click Components on the navigation tree to the left, then click the type of component you want to delete.

4. Highlight the component(s) you want to delete.
   The component detail appears at the bottom of the Price List editor.
   You can highlight multiple components by holding CTRL on your keyboard while clicking the components.

5. Click the Delete button.
   The Component Deletion window warns you that deleting the component will affect the displayed price list items (those at the bottom of the window).

6. Click either Change the Unit Prices or Adjust the Market conditions (depending on which action you want to perform on the price list items).

7. If you want to perform the same action every time you delete a component, click the Always perform the selected action checkbox.
   
   Note: Do not click the Always perform the selected action checkbox unless you’re sure you want to perform this action on all line items for all components. Once you click OK, you will not see the Component Deletion window again. You must go into the Price List Options to turn this window back on again.
8. Click **OK** to delete that component, or **OK to All** to delete all the selected components.
   You can also click **Skip** to skip the deletion of the selected component or **Cancel All** if you decide you don’t want to delete these components after all.
   The requested adjustments are made to the price list item(s) and the component(s) deleted from the component list.

9. Click the **File** menu and choose **Save** or **Save and Exit** to save the modified component list.

**TO DELETE A PRICE LIST ITEM**

1. From the Control Center, click the **Price List** tab.
   The **Price List SmartList** appears.

2. Select the price list you want to delete an item from and click **Open**.
   The **Price List Editor** appears.

3. Click the **[+]** next to **Items** in the navigation tree to see a list of categories.

4. Click the **[+]** next to the category that contains the item you’re deleting to see all the items in that category.

5. Right-click the item you want to delete in the navigation tree and choose **Delete**.
   The item is deleted.

6. Click **File** and choose **Save** or **Save & Exit**.
   The price list item is permanently deleted.

**TO DELETE A SALES TAX**

1. From the Control Center, click the **Price List** tab.
   The **Price List SmartList** appears.

2. Select the price list you want to delete a sales tax from and click **Open**.
   The **Price List Editor** appears.

3. Click **Sales Taxes** from the navigation bar on the left of the **Price List Editor**.
   If you don’t see **Sales Taxes**, click the **[+]** next to **Taxes**.

4. Right-click the sales tax jurisdiction you want to delete, then choose **Delete**.

5. Choose **Save** or **Save & Exit** from the **File** menu.
   The sales tax jurisdiction is removed from the price list.

**TO DOWNLOAD A PRICE LIST**
To use this method, you must be a registered XactAnalysis user.

1. From the main Control Center toolbar, click **Services**, then **Request price list(s) from XactAnalysis**, and **Xactware price list**.
   The **Request Price List** window appears.
2. Select the price list(s) you need by using the attached SmartLists to specify a location (Country, State/Province and City).
   You can select more than one, as long as they’re all in the same state or province.

3. In the bottom portion of this window, indicate if you want the ZIP/Postal Code table, and whether you want the price list for all profiles.

4. After making your selections, click the **Download Now** button.
   A window appears advising you that the price lists have been downloaded and are now available to use.

5. Click **Done**.

6. When Xactimate informs you that the price lists are ready to use, click **OK**.
   The price lists now appear in your *Price List SmartList* when you click the **Price List** tab in the **Control Center**.

**TO DUPLICATE A PRICE LIST**

To copy a price list,

1. From the Control Center, click the **Price List** tab.
   The *Price List SmartList* appears.

2. Highlight the price list you want to use as a template for your new duplicate price list.

3. Click **Options**, then select **Duplicate**.
   The *Duplicate Price List* window appears.

4. Enter the name of your new price list.

5. In the **Items to Copy** field, choose to copy **All Categories**, **Selected Categories**, or **Selected Items**.

6. If you choose **Selected Categories** or **Selected Items**, place a checkmark next to each item or category you want to include in the new price list.
   You can click **Check All** or **Check None** if you know you want almost all or almost none of the items or categories.

7. Mark the **Categories**, **Components**, or **Supporting Events** checkboxes if you would like to remove these unused items from your new price list.

8. Click **OK** to start the duplication process.
   The new price list is added to the *Price List SmartList*.

**TO DUPLICATE A PRICE LIST COMPONENT**

1. From the Control Center, click the **Price List** tab.
   The *Price List SmartList* appears.

2. Select the price list you want to add a duplicate component to and click **Open**.
   The *Price List Editor* appears.
3. In the navigation tree under [-] Components, click the component type that describes the component you are duplicating.
   This is either Material, Labor, or Equipment.
   A list of components of the selected type appears in the Price List Editor on the right.

4. Right-click the component you want to duplicate and choose Duplicate.
   The component is copied and added to the list.

5. Edit the component information.
   The duplicate must have a different component code than the original.

6. When you've finished entering all the necessary information for this component, choose Save or Save and Exit from the File menu.
You can now use the new component in a price list item.

**TO DUPLICATE A PRICE LIST ITEM**

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Highlight the price list you want to duplicate an item in and click Open.
   The Price List Editor appears.

3. Click the [+ ] next to Items in the navigation tree.
   The Price List Editor displays the categories contained within the price list.

4. Click the [+ ] next to category that contains the item you want to duplicate.
   The Price List Editor displays the items within the selected category.

5. Right-click the item you want to duplicate and choose Copy.

6. Right-click the item you want to duplicate and choose Paste Insert.
   The Duplicate Item window appears.

7. Click Leave the existing item and create a new item named [item2] and click OK.
   A duplicate item window appears to the right of the navigation tree and this item is placed under the same category in the navigation tree.

8. Make the necessary modifications to this price list item so that it accurately describes the actual item.
   This includes category and selector codes, activity, description, price attributes, calculations, etc.

9. When you've finished, choose Save or Save and Exit from the File menu.
   The price list item is now ready to be used in your estimates.
TO DUPLICATE A PRICE LIST SUPPORTING EVENT

1. From the Control Center, click the **Price List** tab.
   The *Price List SmartList* appears.

2. Select the price list you want to add a duplicate supporting event to and click **Open**.
   The *Price List Editor* appears.

3. In the navigation tree under [*] *Supporting Events*, click the type of supporting event that describes the *
   supporting event you are duplicating.
   This is either *Material*, *Labor*, or *Equipment*.
   A list of supporting events of the selected type appears in the *Price List Editor* on the right.

4. Right-click the supporting event you want to duplicate and choose **Duplicate**.
   The supporting event is copied and added to the list.

5. Edit the supporting event information.
   The duplicate must have a different code than the original.

6. When you've finished entering all the necessary information for this supporting event, choose **Save** or
   **Save and Exit** from the **File** menu.

You can now use the new supporting event in a price list item.

TO DUPLICATE SUPPORTING EVENTS FOR RETAIL LABOR
To copy a retail labor supporting event,

1. From the Control Center, click the **Price List** tab.
   The *Price List SmartList* appears.

2. Highlight the price list that contains the supporting event you want to duplicate, then click **Open**.
   The *Price List Editor* appears.

3. Click **Labor** from under *Supporting Events* in the navigation tree in the *Price List Editor*.

4. Right-click the supporting event you're copying, then click **Duplicate**.
   A copy of the highlighted supporting event appears in the supporting events list.

5. Enter a new supporting event code for this event.

6. Type percentages in each necessary tab to account for the applications of labor efficiencies you will be
   using:
   - The setting *Remodel with service charges factored in (RSR with SC)* means that no base service
     charge is applied as a separate item. This selection uses the lowest labor productivity rate because
     the labor charge includes additional time needed for drive time, daily planning, set up, clean up,
     breaks and a factor to account for job accessibility issues related to remodeling work.
   - The *Remodel with service charges broken out (RSR no SC)* selection increases the labor productivity.
     By moving factors such as drive time and daily planning into a base service charge, you gain
     efficiency, since these charges are added just once per trade.
The New Construction setting increases labor productivity by removing the factors related to job accessibility experienced in Remodeling work. No base service charges are applied to each Trade using this setting.

7. Click Save or Save and Exit from the File menu to save the new supporting event in the price list.

TO EDIT A FRINGE BENEFIT

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Highlight the price list you want to edit a fringe benefit for and click Open.
   The Price List Editor appears.

3. Click Burden Taxes under Taxes on the navigation bar.
   The Burden Taxes list appears.

4. Highlight the trade tax you want to modify fringe benefits for in the lower sub-window, then click the Fringe Benefits % Rate field.

5. Type the new rate, then press Enter on your keyboard and type the dollar amount into the $ Amount field.

6. Repeat steps 4–5 for all labor types you want to edit fringe benefits for.

7. Click the File menu and choose Save or Save & Exit.
   Xactimate saves the changes you’ve made.

TO EDIT A LABOR BURDEN TAX

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Highlight the price list you want to edit a labor burden tax for and click Open.
   The Price List Editor appears.

3. Click Burden Taxes under Taxes on the navigation bar.
   The Labor Burden Taxes List appears. If you want to edit a global tax, continue on to step 4. If you want to edit a trade tax, skip to step 5.

4. In the Global Labor Burden section, click the % Rate column of the tax you want to edit and type the new rate.
   Skip to step 7.

5. In the Trade Specific Burden section, highlight the trade tax you want to edit, then click on the column you want to edit.

6. Type the new rate in the field and press Enter on your keyboard.

7. Click the File menu and choose Save or Save & Exit, and the changes you've made are saved.
TO EDIT A PRICE LIST CATEGORY

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Select the price list that contains the category you want to edit and click Open.
   The Price List Editor appears.

3. Click Categories in the navigation tree to the left of the Price List Editor.
   The categories list appears, along with a description of the highlighted category.

4. Highlight the category you want to edit in the top half of the Price List Editor.

5. Edit the information for that category in the lower half of the Price List Editor.

6. Click the File menu and choose Save or Save & Exit.
   Xactimate saves the changes to the category.

TO EDIT A PRICE LIST COMPONENT

Price list items are made up of assemblies that involve three types of components: labor, material, and equipment. You can view and make changes to the complete list of these components from the Price List Editor.

Keep in mind that one component may be used in several item assemblies, so changing the price of a component can change the price of several price list items. There are only about 19 trades or labor components in most price lists; these labor rates affect the prices of thousands of items. Therefore, you should exercise caution in making changes. You may want to double-check the items that will be affected by a change in the price of a particular component. To do this, click the Price List Items button to view all the items that use this component.

In addition to editing the description and price, you can also specify whether the component is taxable or exempt.

If you have sufficient rights, you can modify the base service charge for labor components. Note that these changes have been carefully researched; caution should be exercised when making changes.

To edit a price list component,

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Select the price list in which you want to edit a component and click Open.
   The Price List Editor appears.

3. Click Components on the navigation tree to the left, then click the type of component you are editing.

4. Highlight the component you want to edit.
   The component detail appears at the bottom of the Price List editor.

5. Edit the component information.

6. Click the File menu and choose Save to save the modified component.
**TO EDIT A PRICE LIST ITEM**

1. From the Control Center, click the **Price List** tab.
   
   The **Price List SmartList** appears.

2. Highlight the price list you want to edit an item from and click **Open**.
   
   The **Price List Editor** appears.

3. Click the [+ ] next to **Items** in the navigation tree.
   
   The **Price List Editor** displays the categories contained within the price list.

4. Click the [+ ] next to category that contains the item you want to edit in the navigation tree.

5. Click the price list item you want to edit.

   The detail for this price list item appears to the right of the navigation tree.

6. Make the appropriate changes to the item’s main window.

   While you probably won’t need to make changes to the category and selector codes, you can modify them if you want. You can also make changes to the default activity, price attributes, calculation, unit, and depreciation, as well as the **Activity Price Table**, the **Definition** page, and the **Sketch Properties** page.

7. If you want to add a new activity to this price list item, highlight it in the **Activity Price Table** and click **Add**.

8. Click any activity page that you need to modify and make the necessary changes there.

   You can add, edit, or delete items in the **Assembly Item Table**. You can also make changes to the **Definitions**, **Supporting Events**, **Assembly Info**, and **Sales Taxes** windows. In addition, you can edit any of the pricing fields at the bottom of the page that are active.

9. When you’ve finished changing all the necessary information for this item, choose **Save** or **Save and Exit** from the **File** menu.

   The price list item has now been modified.

**TO EDIT A SALES TAX**

1. From the Control Center, click the **Price List** tab.

   The **Price List SmartList** appears.

2. Highlight the price list you want to edit a sales tax for and click **Open**.

   The **Price List Editor** appears.

3. Click **Sales Tax** button under **Taxes** on the navigation tree in the Price List Editor.

   The **Sales Taxes** window appears, displaying the tax jurisdictions above and the list of each jurisdiction’s sales taxes below.

4. Highlight the jurisdiction you want to edit.

   The sales taxes for that jurisdiction appear in the fields below the jurisdiction list.
5. Highlight the sales tax you want to edit.
   The detail for that sales tax appears in the fields below the list.

6. Make any necessary changes to the first two fields: Order and Type.

7. Make any of the following changes in the tax Rate and Base fields:
   - If this tax is calculated based on a percent, enter that percent in the Rate field.
   - If you entered a percent in the Rate field, enter the amount to be taxed (a variable) in the Base field.
     To apply the tax to the entire amount of the estimate, type TOTAL in this field. Otherwise, click the Calculator button and click the Functions button.
   - The choices available in Functions let you select variables to use as the taxable amount.

8. Select whether O&P is to be taxed or computed on this tax (or neither).

9. If this tax is to be used in the calculation of another tax in the same jurisdiction, enter a name in the Result field.

10. If you have a tax list you want to apply this tax to (or that you want to make exempt from this tax), click the Items drop-down button and select either In List or Not In List.

11. Click the Tax List drop-down button and select the tax list you are applying/not applying this tax to (as selected in step 10).

12. Choose Save or Save and Exit from the File menu to save the changes to the sales tax.

**TO EDIT A SUPPORTING EVENT**

To edit a supporting event,

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Highlight the price list that contains the supporting event you want to edit, then click Open.
   The Price List Editor appears.

3. Click Materials or Equipment from under Supporting Events in the navigation tree in the Price List Editor.
   If you are editing supporting events for retail labor, see “To edit supporting events for retail labor” on page 180 for instructions.

4. Highlight the supporting event you’re modifying and type a new description and/or percent for this event.
   You can see the line items that use this supporting event at the bottom of the window.

   When finished, click Save or Save & Exit from the File menu to accept the changes.

**TO EDIT SUPPORTING EVENTS FOR RETAIL LABOR**

To edit a supporting event,

1. From the Control Center, click the Price List tab.
   The Price List SmartList appears.

2. Highlight the price list that contains the supporting event you want to edit, then click Open.
   The Price List Editor appears.
3. Click **Labor** from under *Supporting Events* in the navigation tree in the Price List Editor.

   If you are editing supporting events for materials or equipment, see "To edit a supporting event" on page 180 for instructions.

4. Select the labor efficiency that you want to modify (this will appear in the window below the labor supporting events), then enter the new percentage into the field provided.

   - The setting *Remodel with service charges factored in (RSR with SC)* means that no base service charge is applied as a separate item. This selection uses the lowest labor productivity rate because the labor charge includes additional time needed for drive time, daily planning, set up, clean up, breaks and a factor to account for job accessibility issues related to remodeling work.
   - The *Remodel with service charges broken out (RSR no SC)* selection increases the labor productivity. By moving factors such as drive time and daily planning into a base service charge, you gain efficiency, since these charges are added just once per trade.
   - The *New Construction* setting increases productivity by removing the factors related to job accessibility experienced in remodeling work. No base service charges are applied to each trade using this setting.

   You can see the line items that use this supporting event at the bottom of the window.

When finished, click **Save** or **Save & Exit** from the *File* menu to accept the changes.

**TO EDIT WORKERS COMPENSATION**

1. From the Control Center, click the **Price List** tab.

   The *Price List SmartList* appears.

2. Highlight the price list you want to edit workers comp. for and click **Open**.

   The *Price List Editor* appears.

3. Click **Burden Taxes** under *Taxes* on the navigation bar.

   The *Labor Burden Taxes List* appears.

4. Highlight the trade tax you want to modify workers comp for in the lower sub-window, then click the **Workers Comp % Rate** field.

5. Type the new rate, then press **Enter** on your keyboard and type the dollar amount into the *$ Amount* field.

6. Click the *File* menu and choose **Save** or **Save & Exit**.

   The changes you’ve made are saved.

**TO FILTER PRICE LISTS**

1. From the Control Center, click the **Control Center** tab, then click the **System Settings** tab.

   The *System Settings* window appears.

2. In the navigation tree to the left, click **Defaults** under *Project*.

   The *Project Defaults* page appears.

3. In the *Price List* section, click the **Price List Filter SmartList button**.

   The *Price List Filter SmartList* appears. If you have already created the filter you want to use, skip to step 7.
4. Click **Add**.
   The *Price List Filter Editor* appears.

5. Place a checkmark next to each division you want included in your estimates.
   You can include portions of a division by clicking the plus sign [+]] next to each phase and placing a
   checkmark next to the portion of the division you want to include. Click the [+] again to filter out actual line
   items.

6. Enter a name for this filter in the *Filter Name* field, then click **OK** to return to the *Price List Filter SmartList*.

7. Highlight the filter you want to use for your estimates, then click **OK**.
   All price list items that you haven’t specifically selected for your estimates are filtered out. You can
   override this filter for any individual estimate by applying a different filter to the estimate itself.

This filters price lists for all users. If you want to filter price lists for yourself only (or the currently logged-in
user), click *User Preferences* instead of *System Settings* in step 1 and follow the rest of the steps as written.

**TO PRINT PRICE LIST REPORTS**
Xactimate allows you to print a number of reports, based on your selected price list. You can then personalize
these reports to print the specific information you are interested in.

To print a price list report,

1. From the Control Center, click the *Price List* tab.
   The *Price List SmartList* appears.

2. Highlight the price list you want to print a report for.

3. Click the **Options** button, then choose **Print Price List**.
   The *Price List Reports* window appears.

4. Click the **Report drop-down** at the top of this window and select the report you want to create.
   You can choose from the following reports:
   - **Base Service Charges**: prints the base hours, wage, and total for each labor category.
   - **Labor Breakdown**: prints a breakdown of each hour of labor by labor code, wage burden, burden
     percentage, and overhead.
   - **Negative Market Conditions**: goes through the current price list and prints all items that have negative
     market conditions, along with the amount.
   - **Price List Book Report**: prints all the items from the price list in book format; it can also print the items
     in a specific category. It allows you to select several other formatting and report options.
   - **Price List Book Report with Division Breakdown**: prints all the items from the price list in book format;
     it can also print the items in a specific category, giving details on the price breakdown, action, and
     others. It allows you to select several other formatting and report options.
   - **Price List Report**: gives a breakdown of price list items by selection, and action.
   - **Price List Report with Division Breakdown**: gives a breakdown of price list items by selection, action,
     and division.

   If you selected the *Base Service Charges*, *Labor Breakdown*, or *Negative Market Conditions* reports, skip
   to step 10. If you selected one of the standard Price List reports, then the *Print Options* tab will contain
   options you can select; continue on with step 5.
5. Select the categories from this price list that you want to print.
   You can either print all categories, or you can select to print specific categories only.

6. Click the **Include Taxes** checkbox if you want to include taxes in this report.

7. If you are printing taxes for this report, click the **Jurisdiction drop-down** to select the jurisdiction you want to print.

8. Under **Item Options**, click the checkmarks if you would like to include the definitions for each item, or to add a blank space between each line item.
   Selecting either of these options will make your report longer.

9. If you’d like to print only certain activities, coverage types, price attributes, or market conditions, click the **All** checkbox for that option (to uncheck it), then place a checkmark next to the options you want to print.
   If you want to keep all activities, coverage types, price attributes, and/or market conditions, keep the **All** checkboxes checked.

10. Click **View** to see the report on your computer monitor, or click **Print** to print the report on paper.
    If you click **View**, you can save a copy of the report as a .pdf file on your computer.

**TO RENAME A PRICE LIST**

To rename a price list, from the Control Center:

1. From the Control Center, click the **Price List** tab.
   The **Price List SmartList** appears.

2. Highlight the price list you want to rename and click **Open**.
   The **Price List Editor** appears.

3. In the **Name** field, change the name and/or the description of the price list.

4. Click the **File** menu and choose **Save** or **Save & Exit** when finished.

**TO RETRIEVE A PRICE LIST**

1. From the Control Center, click **Services**, then **Data Transfer**.
   The **Data Transfer** window appears.

2. Verify that **Folder** is selected in the **Transfer Type** area, and that **Retrieve** is selected in the **Action area**.

3. Enter the path from which you want to retrieve your price list(s) in the Retrieve data From: field, or click the **Browse** button to select a path.

4. Press **Next**.

5. Click **Price Lists** in the field on the left, then click the price list(s) you want to retrieve.

6. Click the **Retrieve** button to retrieve the price list(s).
PROJECTS

This section helps you learn more about working with your projects in the Projects window:

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To activate the Project Filter SmartList

The Project Filter SmartList is inactive before you begin to use any project filters. You can create a sample filter to activate it. To do this,

1. Click the Project tab from the Control Center.
   The Projects window appears.
2. Make sure the Project Filter/Search window is available by clicking the View menu and making sure Project Filter/Search has a checkmark in front of it.
3. Under User ID, click Select, then click the SmartList button and select SUPER.
4. Under Profile, click Current.
5. Click the Save button from within the Project Filter/Search window.
   The Save Project Filter window appears.
6. Type SAMPLE in the Filter Name field, then type sample again in the Description field.
7. Click OK.
   You will see the Open button become active.
8. Click Open.
9. The Project Filter SmartList appears.
   You can now add, edit, delete, and duplicate project filters as you would in any other SmartList. After you've created another usable project filter, you can delete the SAMPLE project filter.

To change the status of an estimate from the Projects window

1. Open the Projects window.
2. From the Projects SmartList, highlight the project you want to change the status of.
3. Click the **Options** button and highlight **Change status**, then choose the status you want this project to be.

If there are any problems with changing this status (for example, if there is data missing that is required for a **Complete** status), the **Projects Information** window informs you of this. You would then have to open the project and enter the missing information before repeating the process.

If there were no problems, your project status has now been changed.

**TO COPY A PROJECT**

1. Click the **Project** tab from the Control Center.
   
   The **Projects** window appears.

2. Click the project you want to copy in the **Projects SmartList** and then click **Options**, then **Duplicate**.
   
   The **Duplicate Project** window appears, with the current name in the **Project** field.

3. Enter a different name for the duplicate and click **OK**.

**TO CREATE A NEW PROJECT**

To create a new project,

1. Click the **Project** tab from the Control Center, then click **Add**.
   
   The **New Project window** appears.

2. Type a name for the project in the **Project** field (or keep the default project name).
   
   The name have letters, numbers, or both but cannot contain any spaces. Letters are always capitalized.

3. Click the **Profile drop-down button** to select the Xactimate profile you want this project created in.
   
   If you have a standard profile, you can change the default that appears in the **System Settings Info** page.

4. Click the **Type drop-down button** to select the type of project you’re creating.

5. Click the **OK** button.
   
   The project opens and you can begin working on it.

**TO CREATE A PROJECT FILTER**

To create a project filter,

1. Click the **Projects** tab from the Control Center.
   
   The **Projects** window appears.

   Note: If you can’t see **Filter at the top of the Project SmartList**, click the **View menu and choose Project Filter/Search**.

2. Click the **Turn Filter On** link (located just above **Open** on the **Projects SmartList**).
   
   The **Filter** fields become editable.
3. If you want to filter out projects created by most users, click the User ID Select radio button, then click the SmartList button to select the users whose projects you want to view. Click OK to close the Project Users SmartList.

You can select more than one user by holding the Control (Ctrl) key on your keyboard as you click the users.

4. If you want to filter out projects created in most profiles,
   - click the Current radio button to filter out all projects from any other profile but the one you’re currently in.
   - click the Select radio button, then click the SmartList button to select the profiles with the projects you want to view. Click OK to close the Profile SmartList.

You can select more than one profile by holding the Control (Ctrl) key on your keyboard as you click the profiles.

5. If you want to filter out specific project types, place a checkmark next to each project type you want to view.

You can choose from estimates, valuations, and XactInfo projects.

6. If you want to filter out specific statuses, place a checkmark next to each status you want to view.

You can choose from In Progress, Completed, and Reassigned.

7. If you want to filter out projects based on their dates last modified,
   - click the Date Range From radio button and click the drop-down button to enter the earliest date you want to see projects for, then click the drop-down button to enter the latest date you want to view projects for.
   - click the Past radio button and enter the number of days previous to today that you want to view projects for.

8. If you want to add a search filter that allows you to filter out any projects that do not contain specific text,
   a. Click the Search For checkbox.
   b. Type the text you want Xactimate to search for in the adjoining field.
   c. Click the Any Field drop-down button to select the field you want this text to appear in.

Leave Any Field in this field if you don’t have a specific field where the text should appear.

9. Click the Save button to keep this filter to be used at any time.

The Save Project Filter window appears.

10. Type a name and description for this filter.

For example, you could type WSA_COMP_EST for a filter for completed estimates created by WSA.

11. Click OK.

The filter is added to the Project Filter SmartList.

12. To use this filter immediately, click Apply Now.

The Project SmartList is filtered of all projects that don’t fit the criteria you entered.

See also:
   “To use project filters” on page 190
**TO CREATE A VALUATION**

To create a new valuation,

1. Click the **Project** tab from the Control Center, then click **Add**.
   
   The **New Project window** appears.

2. Type a name for the project in the **Project** field (or keep the default project name).
   
   The name have letters, numbers, or both but cannot contain any spaces. Letters are always capitalized.

3. Click the **Profile drop-down button** to select the Xactimate profile you want this project created in.
   
   If you have a standard profile, you can change the default that appears in the **System Settings Info** page.

4. Click the **Type drop-down button** to select **Valuation**.

5. Click the valuation type drop-down button to select the type of valuation you are creating.
   
   Depending on your profile, you may be able to choose from Residential, Commercial, Agricultural, Manufactured, and Condos.

6. Click the **OK** button.
   
   Xactimate opens the Valuation Overview page, where you can enter information for your valuation.

**TO DELETE A PROJECT**

1. Click the **Project** tab from the Control Center.

   The **Projects** window appears.

2. Click the project you want to delete in the **Projects SmartList**.

3. Click the **Delete** button.

4. Click **Yes** when you are asked if you are sure you want to remove the project.

Deleting the project removes it permanently; it cannot be recovered. Instead of deleting a project, you may want to consider archiving it instead.

**TO EDIT A PROJECT**

1. Click the **Project** tab from the Control Center.

   The **Projects** window appears.

2. Click the project you want to edit in the **Projects SmartList**, then click **Open**.

3. Edit the project.

4. Click **Save & Exit** to save your changes and close the estimate.
TO FIND A PROJECT
1. Click the **Project** tab from the Control Center.
   
   The *Projects* window appears.
2. Click in the empty field at the top of the *Projects SmartList*.
3. Begin typing the name of the project.
4. Once the name of the project appears highlighted in the SmartList, press **Enter** to open it.

TO GET INFORMATION ABOUT A PROJECT
1. Click the **Project** tab from the Control Center.
   
   The *Projects* window appears.
2. Click the project you need information for in the *Projects SmartList*, then click **Info/Rename**.
   
   The *Project Information* window appears with information about the selected estimate.

TO MERGE PROJECTS
You can combine several estimates into one, which allows several adjusters to work on the same claim and then merge them prior to completion.

*Note: You can only merge estimates. Valuations cannot be merged.*

1. Click the **Project** tab from the Control Center.
   
   The *Projects SmartList* appears.
2. Highlight the estimate you want to use the *Claim Info* from, then click **Merge Projects** from the upper right corner of the *Projects* window.
   
   The *Project Merge wizard* appears.
3. Click **Next**.
   
   The Estimates page of the wizard appears. The estimate you highlighted in the *Projects SmartList* appears in the *Source Project* field.
4. In the *Merge Info* area, select whether you want to merge your other estimates into the source project, or to merge them all into a new project.
   
   If you select *New Project*, enter a name for the new project as well.
5. Under *Merging Order*, click the **Add Projects** button.
   
   The *Select Project(s)* window appears.
6. Highlight the estimates you want to merge with the source project, then click **OK**.
   
   The estimate names appear in the *Merging Order* list.
7. If there is a specific order you want to merge the estimates in, highlight an estimate and click the **Move Up** and **Move Down** buttons until they are in the correct order.
8. Click **Finish**.
   
   The estimates are merged and the *Merge Projects* window closes, returning you to the *Projects* window.
You can open the merged estimate to view it for accuracy and to further edit it as you would any other estimate. You might take note of the following when viewing a merged estimate:

- **Sketch**: Xactimate adds a new Sketch page for each merged estimate that has a sketch: a tab with the estimate name appears at the top of the Sketch workspace. Each of the tabs will include the estimate’s Sketch (this includes all levels, rooms, items etc.). The original estimate name that the sketch was merged from will be the default name of the first tab. If you right-click on a tab, you will have three options: *Add New Sketch*, *Delete Sketch*, and *Rename*.

- **Estimate Items**: Click the *Estimate Items* tab to see the grouping window and placement of the rooms. Xactimate creates a heading for each estimate that was merged. The levels and rooms appear attached to each estimate name header. Line items, images attached to line items, sound files, and notes appear in the *Line Item* window just as they did in each of the estimates.

- **Digital Images**: Any digital images from the original estimates are displayed in the merged estimate’s *Digital Image* window. From this screen you can tag, add, delete, or rearrange the images.

### TO PRINT A PROJECT FROM THE PROJECTS SMARTLIST

1. Click the **Project** tab from the Control Center.
   The *Projects* window appears.

2. Click the estimate you want to print in the *Projects SmartList* and then click **Options**, then **Print Project**.
   The *Estimate Reports* window or the *Valuation Reports* window appears.
   
   *Note:* You can also click the **Print** link near the top of the *Projects* window and select **Project**.

3. Click the **Report drop-down button** and select a report from the list of available reports.

4. Set the printing options you want in the different tabbed pages and click **Print**.
   The Microsoft Windows *Print* window appears.

5. Verify the printer settings, then click **OK**.
   
   *Note:* You cannot print an XactInfo project from the Projects SmartList.

### TO RENAME A PROJECT

To rename a project, the project must first be closed and have a status of “In Progress.”

1. Click the **Project** tab from the Control Center.
   The *Projects* window appears.

2. Click the project you want to rename in the *Projects SmartList*, then click **Info/Rename**.
   The *Project Information* window appears.

3. Type the new name in the *Project Name* field, then click **OK**.
**To sort your projects**

1. From the Control Center, determine the category you want to sort the projects by from the column headers at the head of the *Projects SmartList*.
   
   Sort criteria include the project name, the name of the insured, the ID of the person who created the estimate, etc.

2. Click the column header of your choice and drag it to the left of all the other headers.
   
   The list is now sorted by the header you moved to the left. Items can be sorted in ascending (1, 2, 3 or A, B, C) or descending (3, 2, 1 or C, B, A) order. Click once on the sorting header to switch from ascending to descending order. Click a second time to switch back.

**To transfer an estimate**

1. Click the *Project* tab from the Control Center.
   
   The *Projects* window appears.

2. Click to highlight the projects you want to transfer.

3. Click *Data Transfer* from the top of the *Projects* window.
   
   The *Data Transfer Project* window appears.

4. Verify that *Folder* is selected in the *Transfer Type* area, and *Send* in the *Action* area.

5. Type the path you want to transfer your estimate(s) to in the *Path* field, or use the *Browse* button to select a path.

6. Click the *Track Status* checkbox if you want to keep track of the status of this transfer.

7. Click *OK*.
   
   Xactimate transfers the project(s) to the selected location, then asks if you want to view the results.

8. Click *Yes* or *No*.
   
   If you clicked *Yes*, the *Transfer Results* window appears, displaying the results of the transfer. Close this window by clicking the [*] button in the upper-right corner when finished viewing it.
   
   If you marked the *Track Status* checkbox, the *Data Transfer Status* window appears.

9. View the status of the transfer, then click *OK*.

**To use project filters**

To use a previously created project filter,

1. Click the *Projects* tab from the Control Center.
   
   The *Projects* window appears.

   *Note: If you can’t see Filter at the top of the Project SmartList, click the View menu and choose Project Filter/Search.*

2. Click the *Turn Filter On* link (located just above *Open* on the *Projects SmartList*).
   
   The *Filter* fields become editable.
3. Click the Open button.
   The Project Filter SmartList appears.

4. Click the filter you want to use to filter the Projects SmartList.
   If you don’t see a filter that suits your needs, you can click the Add button to create a new filter.

5. Click OK.
   The details of the filter appear in the Filter window.

6. Click Apply Now.
   The Projects SmartList only shows the projects that fit the criteria of the filter.

See also:
“To create a project filter” on page 185
**REPORT EDITOR**

This topic helps you understand how to use the Report Editor:

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### TO ADD NUMBERING TO LINE ITEMS IN REPORTS

To customize a report that will allow you to number your line items,

1. From the Xactimate Control Center, click the **Modules** menu and choose **Report Editor**.

2. In the upper left corner of the *Palette* pane, click the drop-down button and select **Estimate** as the type of report you’re creating.

3. Click the **Open Report button**.

   The *Template Report List* appears.

4. Click the drop-down button in the upper right corner and select **Estimate Reports**.

5. Right-click on the report you want to customize and select **Duplicate**.

6. Type a new report name and report description. Click **OK** to save your changes.

   The description appears in the *Report list* when printing your estimate.

7. Select the duplicated report in the *Template Report List* and click **OK**.

   The report appears in the **Report Editor workspace**.

8. Scroll down the report until you find the tokens that represent the line items you want to add numbers to.

   Click on any one of the tokens listed in that specific section.

   In the example below (based on the Final Draft report), we’re clicking on **Line Item Prefixed Description** since it’s a part of the section where we will add numbering.

   ![Line Item Example](image)

   **Note:** *If you have a hard time seeing or selecting the tokens, you can enlarge the window by clicking the **Zoom In button**.*

9. Once you have selected a token, click the **Palette** tab in the bottom left corner (next to the **Properties** tab).
10. Near the top of the Palette pane, click on the last item in the list of links.

In the example below, you would click `RES TOK 1728`.

![Xactimate Report Editor - FINAL](image)

11. Scroll through the bottom window in the Palette pane until you find **Line Item Numbering—Estimate Level**.

You may have to scroll sideways to find this token in the list.

*Note:* You can see a description of each token in the status bar at the bottom of Report Editor window.

12. Click the **Line Item Numbering—Estimate Level** token and drag it into the section that contains the line items you are numbering.

13. Adjust the other tokens in the section to create space for the new token.

You can move tokens around by selecting the token and dragging them to your desired location. You can change the size of a token by selecting the token then using the black square box handles to modify the size. You may choose to change the size of the **Line Item Numbering—Estimate Level** token to account for the amount of space you will want to use for your numbering.

14. Place the **Line Item Numbering—Estimate Level** token in front of the line item token where you want it to be seen.

The graphic below displays where you might place the token in a Final Draft-based report.

![Missing Wall: M Miss](image)

15. Once you have modified the report to your specification, save the report by clicking on the **Save Report** button from the toolbar.

16. When you print your estimate, be sure to select the new custom report that was created.
TO ADD YOUR COMPANY LOGO TO REPORTS

Before you add your company logo to your reports, make sure that you have a .jpg file of your company logo.

To add your logo to a report,

1. From the Xactimate Control Center, click the Modules menu and choose Report Editor.
   The Report Editor appears.

2. Open a report that you’ve already created, or create a new report.
   You cannot edit any default Xactimate reports, although you can duplicate them and edit the copies.

3. Assuming you want to place the company logo in the report header (which is standard), click the Edit Report Header button from the toolbar.
   If you do not want to place the logo in the report header, you can place it in the footer or within the body of the report as well.

4. Click the Logical Section button on the toolbar, then click on the workspace where you want to place the top of the section, then click again to place the bottom of the logical section.
   If a logical section already exists on your workspace and you want to add the logo to that section, you can skip this step.

5. Click the Add a Graphic button from the toolbar, then click within the logical section.
   A graphic token appears where you clicked.

6. Make sure the graphic token is still selected, then type Company Logo (or some other descriptive name for your logo) in the Description field under Layout in the Property tab.

7. Click the Image line (in the Property tab), then click the Browse button located in the Image Value field.
   The Windows Open window appears.

8. Browse through your hard drive/network to find the .jpg graphic you want to use as your company logo.
   You can only use .jpg files in your reports.

9. Highlight the graphic image in the Open window, then click the Open button.
   When you click anywhere in the workspace to deselect the graphic token, you will see a small version of the graphic within the token.

10. Click the token that contains your logo, then drag one of its handles to change the size of the graphic.
    The proportions of the graphic are kept, regardless of the size you make it.

11. Once you have the correct size for the graphic, drag the token to the place within the logical section where you want it located.
    You can use the Center Token on Page button if you want the token centered horizontally.

12. Click the File menu and choose Safe Template.
    Xactimate saves the report template.

You can now test your report template by opening an estimate and viewing the report on your monitor. If you determine that you need to make additional changes to the size and/or location of the graphic, you can return to the report editor and make these changes.
TO CREATE A REPORT IN THE REPORT EDITOR

To create your own customized report,

1. From the Control Center, click the Modules menu and choose Report Editor.
   
   The Report Editor appears.

2. In the upper left corner of the Palettes pane, click the drop-down button to select the type of report you’re creating.
   
   You can choose Estimate, Valuation, Price List, Sketch, and Work Order.

3. Click the File menu and choose New.
   
   The Report Information window appears. This window may look different from the description below, depending on the report type you selected in step 2.

4. Click the Report Type drop-down button to select the report type, then enter the name and description (if necessary) for the report.

5. Enter the margins you want to use for the report in the Margins fields.

6. Select Portrait or Landscape to determine the paper orientation you want to use.

7. Select any other necessary options that appear in the Report Information window (again, these will depend on your previous selections), then click OK.
   
   The Report Information window disappears, and you are ready to work in the empty template workspace.

8. In the Palette pane, click the [+] next to Report Body to see the sub-sections for your report.

9. Continue clicking the [+] next to each sub-section until your tokens appear in the window below the sections.

10. Click a token and drag it to your workspace, then release the mouse button.
    
    This places the token onto the report (a token is a shortcut to typing a particular data record that has already been recorded). As soon as you place the token in the workspace, you will see the Palette pane disappear behind the Properties pane. This Properties pane displays the properties of the highlighted item in the workspace (including the workspace itself if you haven’t selected anything within the workspace). You can highlight any item in the workspace and modify it in the Properties pane; click the Advanced tab to make additional edits to the item.

    Note: To make a change to more than one token, hold down the Ctrl key on your keyboard and select the tokens you want to change. The changes you make in the Properties pane apply to all selected tokens.

11. Use your mouse to click-and-drag the token to the position where you want its corresponding text to be in the report.
    
    You can delete a token by highlighting it and pressing Delete on your keyboard.

12. Return to the Palette pane (by clicking the Palette tab at the bottom of the Properties pane) to continue placing tokens into the workspace.
13. When you’ve entered the body of the report, click the Window menu and choose Header Editor.

The Header portion of the Report Editor appears. This workspace is empty.

A header is the top portion of the page that is traditionally the same on all pages (although the first page is often different from the rest). Often the header is made up of a company name and logo, the estimate’s claim or policy number, current date, etc.

14. In the Palette pane, click the [+] next to Header to see the sub-sections for your report.

15. Click a sub-section and drag it to the Header workspace.

16. Repeat steps 10–12 to create a header for this report.

17. When you’ve created the header of the report, click the Window menu and choose Footer Editor.

The Footer portion of the Report Editor appears. This workspace is empty.

A footer is the bottom portion of the page that is traditionally the same on all pages (although the first page is often different from the rest). Often the footer is made up of the page number, the estimate’s claim or policy number, current date, etc.

18. In the Palette pane, click the [+] next to Footer to see the sub-sections for your report.

19. Click a sub-section and drag it to the Footer workspace.

20. Repeat steps 10–12 to create a footer for this report.

21. When the report template is arranged to your satisfaction, click the File menu and choose Save Template.

The report is now ready to be used.

Note: Xactware recommends that, if you have never created a report template before, you duplicate a current report template that’s similar to the one you want to create and edit that, rather than creating a new one fresh.

See also:
“To duplicate a report in the Report Editor” on page 197

TO CUSTOMIZE A REPORT WITH A SPECIALIZED COVERSHEET

To customize a report that will allow the company header to print only on the coversheet,

1. From the Xactimate Control Center, click the Modules menu and choose Report Editor.

2. In the upper left corner of the Palette windowpane, click the drop-down button and select Estimate as the type of report you’re creating.

3. Click the Open Report button.

The Template Report List appears.

4. Click the drop-down button in the upper right corner and select Estimate Reports.

5. Right-click on the report you want to customize and select Duplicate.

6. Type a new report name and report description. Click OK to save your changes.

The description appears in the Report list when printing your estimate.
7. Select the duplicated report in the Template Report List and click OK.
   The report appears in the Report Editor workspace.

8. Click the Edit Report Header button from the toolbar.

9. Highlight the header section and press Delete on your keyboard.

10. Click the Palette tab in the bottom left corner, then click the [+ ] next to Header.

11. Click and drag the First Page Header sub-section onto the report.
   This creates a new section for the header that only appears on the coversheet of the report.

12. Click the Save Report button from the toolbar.

13. Click the Print Preview button, select an estimate, and click View to verify the company header prints only on the coversheet.

TO DUPLICATE A REPORT IN THE REPORT EDITOR
While you can create a brand new report by clicking on the File menu and selecting New, you may find it more convenient to create a new report from an existing template. Since the standard reports are permanent and cannot be edited, you need to first create a duplicate of one of the standard reports and modify that copy to meet your requirements.

To duplicate a report,

1. From the Control Center, click the Modules menu and choose Report Editor.
   The Report Editor appears.

2. In the upper right corner of the Palettes pane, click the drop-down button to select the type of report you’re creating.
   You can choose Estimate, Claim Manager, Valuation, Price List, Sketch, and Work Order.

3. Click the File menu, then choose Open.
   The Template Report List appears.

4. In the upper right corner of the Template Report List window, click the drop-down button to select the type of report you’re creating.

5. Highlight the report you want to duplicate, then click the Options button and choose Duplicate.
   The Report Information window appears.

6. Modify the name and description (if necessary) for the report, then click OK.
   Xactimate returns you to the Template Report List.

7. Make sure the duplicate report you just created is highlighted, then click OK.
   The report is opened in the Report Editor.

8. Make the necessary modifications to the report template (add or delete tokens, move token around on the page, etc.), then click the File menu and choose Save Template.
   You can now use the template to print reports.
REPORTS
This section gives you assistance in some of the aspects of reports in Xactimate.

▲ To create the Production report (page 198) ▲ To print flooring cuts in reports (page 198)
▲ To print reports in different languages

TO CREATE THE PRODUCTION REPORT
The Production report is only available in specific profiles and can be used to measure the differences in the amount of time that was estimated to complete a job, and the amount of time actually spent.

The Allowed column on the report deals with Units which represent the amount of time estimated in 5-minute increments. For example, if you estimated 1 hour, the allowable units would be 12.

You can create the Production report by following these steps:

1. Open the estimate you would like to run the Production Report for.
2. Click the Estimate menu and choose Print.
   The Estimate Reports window appears.
3. Click the Report drop-down button.
   Xactimate displays a list of available reports.
4. Scroll through the list and select Production.
5. Click either View or Print to access this report.

TO PRINT FLOORING CUTS IN REPORTS
You can print your flooring cuts along with your Sketches when you print estimate reports. To do this,

1. From the estimate you are printing reports on, click the Estimate menu, then choose Print.
   The Estimate Reports window appears.
2. If it is not checked, click to place a check next to the Sketch checkbox under Print Selection.
3. Click the Sketch tab.
4. Click to place a check next to the Print Flooring Cut Diagram(s) checkbox.
5. Click View to see the report on your monitor without printing it, or click Print to print the report.

TO PRINT REPORTS IN DIFFERENT LANGUAGES
You can print your estimate reports in English, Spanish, or French. To do this,

1. From the estimate you are printing reports on, click the Estimate menu, then choose Print.
   The Estimate Reports window appears, with the Print Options page in front.
2. Select the report you want to print from the Report field.
3. Select the categories, paper type, print selection, and additional options you want to print.
4. Near the bottom right of this window, click the **Language drop-down button** and select the language you want to print this report in.

5. Make any additional selections you want to choose in the other tabs in the *Estimate Reports* window.

6. Click **View** to see the report on your monitor without printing it, or click **Print** to print the report.

   The report is printed in the language you selected, regardless of the language the estimate was scoped in.
**SKETCH**

The Sketch section helps you understand some of the processes you can perform in Sketch.

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TO ADD CARPETING TO A ROOM IN SKETCH
Adding carpeting (or any other flooring) to a room is quick and easy in Sketch.

1. Make sure you have drawn the room you are adding carpet to.

2. Click Search Price List - [price list] near the top of the Search pane.

3. Type FCCAV into the Search field at the top of the Search pane.
   FCCAV is the code for most standard carpets and includes the carpet, tackless strip, seaming tape, seaming iron, power carpet stretcher, and installation labor. If you want to use a different code, enter it instead. If you want to use a different carpet for this room but you don’t know the code for it, see “Graphical Estimation Using Item palettes and Key Word Search” in the Xactimate RTT.

4. Click FCCAV from the Search pane, then move your cursor over the Sketch workspace.
   You will notice that the cursor looks something like this:

5. Move your cursor near the center of the room you’re adding carpet to. Make sure the entire room is highlighted.
   Wrong:
   ![Wrong](image)
   If you were to click your cursor when the room looked like this, you would place carpet on the walls.
   Right:
   ![Right](image)
   This is the look you want when adding flooring to your floors. Note “Floor” as the quantity in the tooltip.

6. Click your left mouse button.
   Xactimate adds the proper amount of carpet to this room to fill the room. You will also see the carpet code (in this case, FCCAV) appear in the Item List pane below the Sketch workspace.
From here, you can add the carpet to additional rooms in the Sketch, or add additional items (such as carpet pad) to the room. To adjust the quantity and activity of your carpet, click the **Spacebar** to see the Add Line Item pad, where you can make changes to your activities, quantities, depreciation, price, etc.

You can also instruct Xactimate to make additional calculations to account for carpet patterns, unusual carpet roll widths, and stairs by opening the Item Property Editor window: you can do this by clicking the **Spacebar** before adding the carpeting to the room, then clicking the Item Property Editor button (immediately to the right of the Calculator button in the Add Line Item pad).

**TO ADD A DOOR IN SKETCH**

To add a door line item to Sketch,

1. Make sure you have drawn the room you are adding the door line item to.

2. Click Search Price List - [price list] near the top of the Search pane.

3. Click Dor Doors.

   All line items that fall into the Door category appear in the Search pane.

   You can further refine this list by typing the type of door you are adding into the field at the top of this window; i.e., “overhead door,” “interior door,” “sliding door,” etc., then clicking Search. This narrows the list to only those door items that have the text you entered in its description.

4. Click the line item that you are adding to the Sketch from within the Search pane, then click the point in the wall that marks the center of the door you’re placing.

   Xactimate places the door in the location indicated.

**TO ADD A FENCE IN SKETCH**

To add a fence in Sketch, you must draw straight fence segments.

1. Click the **Fence** button.

2. Click your cursor on the Sketch workspace where you want to begin the fence segment.

3. Drag the cursor to the end of the fence segment.

   Xactimate displays a gray dotted line that shows you where the fence will be placed.

4. If this is the end of the fence segment only, click the left mouse-button.

   If this is the end of the entire fence, double-click the left mouse button and skip to step 6.

5. Repeat steps 3–4 until you finish drawing the entire fence.
6. Right-click a section of the fence and choose Properties.
   
   The Fence Properties window appears.

7. Make sure the grouping code (under General) is correct.
   
   You can create your own grouping code if you choose to not use the Xactimate default. The grouping code is the method Xactimate uses to distinguish each fence segment in the Estimate Items window.

8. Under Framing, click the drop-down buttons to select the proper fence construction and materials.

9. Adjust any variables as necessary.

10. Click anywhere on the Sketch workspace away from the Fence Properties window.
    
    Xactimate closes the window.

11. Repeat steps 6–10 for all fence segments in the estimate.

**TO ADD GRAPHICS TO YOUR SKETCH**

You can add graphics directly to your sketch after you’ve added them to your estimate. See “To attach an image to your estimate” on page 157 for more information on adding graphic images to your estimate.

To add a graphic to your Sketch,

1. From within the estimate you’re working with, click the Sketch tab.

2. Click the Photos tab from the estimating windows to the left of the Sketch workspace.
   
   *Note: If you don’t see the Photos tab, press Control+Shift+4. This brings the Photos pane to the front of the estimating windows.*

   The Photos pane contains thumbnails of all the graphic images entered in the Digital Images window.

3. Scroll through the graphics in the Photos list until you find the one you want to add to your Sketch.

4. Click the graphic, then drag it onto the Sketch workspace to the location where you want it to be, then click the left mouse button.

   The Sketch Digital Image window appears.

5. Type any description necessary for this graphic, as well as a name for the graphic, then click OK.

   The graphic is now attached to your sketch. At this point, you can use Sketch Annotations to make additional notes and add arrows and lines if any further explanation is necessary.
**TO ADD HIGHER LEVELS IN SKETCH**

To add a higher level to your sketched floor plan,

1. From within an estimate’s Sketch window, choose **Insert Level Above** from the **Edit** menu.
   The **Add Level** window appears.

2. Enter the name of the new level in the **Level Name** field and press **Tab** to jump to the **Elevation** field.
   The **Elevation** field displays a value nine feet more than the underlying level. This is based on the assumption of an eight-foot ceiling height and a one-foot allowance for the floor thickness. The benchmark elevation (100) from which all others are measured is the top of the ground floor.
   If the level below the new one you’re creating has a ten-foot ceiling and a floor assembly height of one foot resting on the wall, the elevation of the next level above is 111’.

3. Enter a new elevation if the default elevation is incorrect.

4. Click **OK**.
   A blank page for the new level appears.

At the bottom of the Sketch workspace, you can keep track of which level you are on by viewing the level tabs.

![Level Tabs](image)

**TO ADD JOINING ROOMS IN SKETCH**

1. From within an estimate’s Sketch window, click the **Room** button.

2. Place the cursor at the spot on an existing wall where the top left corner of the new room will be located.
   If you place the pointer at the top right or bottom left corner of the existing room, Sketch displays the image of a square room based on the length/width of the connecting (joining) wall.
   You do not have to start at a corner; you can simply place the cursor in the middle of the wall if necessary.

3. Click once to place the new room next to the existing room.
   The new room size will be a square room based on the length of the existing room’s joining wall. For example, if the existing room’s common wall measures 11 feet, the new room will be 11’x11’. You can then adjust the new room as necessary.
   The joining wall shared by the new and existing rooms is automatically merged into a single wall.

4. To create a new room with dimensions of your choosing, click and drag from the initial corner using the grid as a guide for the room dimensions.
**To Add Lower Levels in Sketch**

1. From within an estimate's Sketch window, choose **Insert Level Below** from the *Edit* menu.
   
   The **Add Level** window appears.

2. Enter the name of the new level in the *Level Name* field and press **Tab** to jump to the Elevation field.
   
   The Elevation field displays a value nine feet less than the underlying level. This is based on the assumption of an eight-foot ceiling height and a one-foot allowance for the floor thickness. The benchmark elevation (100) from which all others are measured is the top of the ground floor.
   
   If the level below has an eight-foot ceiling and a floor assembly height of one foot resting on the wall, the elevation of the floor just below ground floor is 91'.

3. Enter a new elevation if the default elevation is incorrect.

4. Click **OK**.
   
   A blank page for the new level appears.

At the bottom of the Sketch workspace, you can keep track of the level you are on by viewing the level tabs.

**To Add a Roof Overbuild in Sketch**

After you've sketched the main portion of your roof in the Sketch window of an estimate,

1. Click the **Roof button** to add an overbuild section of roof.

2. If the ridge line of the overbuild candidate needs to be turned, press the **Tab** key until the overbuild ridge line is at the correct angle to the previous roof section.

3. Drag the overbuild section of the roof over the previous roof until the edge of its bounding box aligns with the ridge of the previous roof section.
   
   A point should form where the overbuild ridgeline and valleys intersect with the previous roof segment.

4. To adjust the overbuild ridge elevation, right-click its label, choose **Properties**, and open **Dimensions**.

5. Enter the correct ridge height, slope, or rafter length dimensions in the fields provided.

6. Click **OK**.
   
   Your sketch is automatically adjusted.

It’s often a good idea to click the 3-D button at the bottom right of your workspace to see if the virtual roof you’ve created looks like the real thing.

**To Add Snap Lines in Sketch**

Snap lines provide an easier way to align multiple objects on one or more levels in Sketch. When you place a snap line on your Sketch workspace, you can place walls that can be aligned or merged to the coordinates of the snap line itself.

To place snap lines, open an estimate and go to the Sketch workspace,

1. Click the **Add Snap Lines button** from the bottom of the Sketch workspace.

   You will see the snap lines attached to your curser as you move it around on the Sketch workspace.
2. Click the workspace to place the snap lines.
   The intersection of the snap lines will be where you clicked.

3. Click and drag the snap lines anywhere along their length to move them. Click and drag the snap lines’
   intersection point to move both the horizontal and vertical snap lines at the same time.

Now when you place/move rooms, roofs, walls, and roof edges, they will "snap" to the nearest snap line
whenever they are moved close to it (you can specify how close a Sketch item needs to be before it will snap
in the Sketch Preferences window).

Snap lines placed on the current level will be viewable on every other level contained within the sketch.

TO ADD A SQUARE ROOF IN SKETCH
While Xactimate allows you to create a series of complex roofs for a structure, the following explains the
basics of adding a square roof to your estimate.

1. In an estimate, create an interior floor plan for an estimate from within Sketch.

2. Add a level above the uppermost level of the interior floor plan.

3. Select the highest interior level as the underlay in the field in the lower left corner of the Sketch
   workspace.

   If selecting an underlay doesn't display anything, make sure the Show Underlay feature is turned on in
   Sketch Preferences View window.

4. Click the Roof button.
   An image of a roof appears.

5. Press Tab on your keyboard to align the ridge line to the estimate correctly.

6. Align the roof so that one corner aligns correctly with the exterior walls of the rest of the estimate, then
   click the left mouse-button.
   By default, the roof will snap to the exterior walls and allow for a certain amount of overhang.

7. Drag the walls of the roof so that they align with the rest of the estimate’s exterior walls.

8. Double-click the roof to name it and give it its proper dimensions.

9. Click OK.
   You can now add line items or construction items to this roof as you would any room.

See also:
   “To add higher levels in Sketch” on page 204
   “To add a roof overbuild in Sketch” on page 205
TO CALCULATE WASTE IN SKETCH ROOFING
To calculate waste in a roof added in Sketch,

1. From within the estimate, click the Sketch tab.

2. After you’ve created a roof in Sketch, click on the Search Price List by Division link in the Search estimating pane.

3. Select Thermal and Moisture Protection on the list that appears.

4. Select Roofing.

5. Left-click on the roofing item you want to place on the roof, then move your cursor over the workspace. A tooltip follows your cursor and includes the name of the price list item and instructions to press the spacebar to change the activity for this item.

6. Move the cursor over the roof, then press the Spacebar to open the Add Line Item window.

7. Click the Item Properties Editor button, just to the right of the Calculator button.

   The Item Property Editor appears.

8. Click the Waste Value drop-down button and select the percentage of waste you want applied to this roofing item.

9. Click OK to close the Item Property Editor, then click OK again to close the Add Line Item window.

10. Left-click to place the roofing item (with waste) on the roof.

    The roofing item appears in the Item List estimating pane.

TO CHANGE CARPET ROLL SIZE
To change your carpet roll size in Sketch, you must first create your rooms in Sketch and add the carpeting to the rooms.

1. From within the Sketch window, highlight the room(s) containing the carpet you’re changing roll size for.

2. In the Item List estimating pane, select the carpeting line item you’re modifying.

3. Click the Item Property Editor button to the right of the Description field.

   The Item Property Editor appears.

4. Click the Material Width field, then enter the actual width of the carpeting roll.

   The default is 12 feet. You can change this to any other measurement.

5. Click OK to close the Material Width window, then click OK again to close the Item Property Editor.

TO COPY AND PASTE A ROOM IN SKETCH

1. From within an estimate’s Sketch window, select the room you want to copy by clicking its name.

   The room handles and dimensions appear.

2. Choose Copy from the Edit menu.

   This copies the room to the Windows clipboard.
3. Choose Paste from the Edit menu.

   The pointer changes to indicate that it is ready to paste to the workspace. When you move the pointer over the workspace, an image of the room appears.

4. Click to place the room on the workspace, either as a joining room or as a separate room.

See also:
“To add joining rooms in Sketch” on page 204

TO COPY A ROOM FROM THE UNDERLAY IN SKETCH
Rather than redrawing rooms in different levels with similar dimensions and shapes, you can use the Copy from Underlay tool to copy the room.

1. From within the Sketch window, and after creating one or more rooms, add a new level to your floor plan.
   If you already have multiple levels, you can skip this step.

2. Click the tab of the level you want to copy rooms into.

3. Make sure the level you want to copy rooms from is displayed in the lower left corner of the Sketch workspace.

   Note: If you can’t see the underlay, open the User Preferences View window and click Show Underlay.

4. Click the Copy from Underlay button.

   You can choose multiple rooms from the underlay if you press Control on your keyboard while you’re clicking to select the rooms.

5. Click inside the room you want to copy.

   The new room is created on the current level.

6. You can now modify the room, using the other level as a guide.

See also:
“To create a simple room in Sketch” on page 211
“To add higher levels in Sketch” on page 204
“To create an odd-shaped room” on page 210
“To create room offsets in Sketch” on page 210
“TO reshape a wall section in Sketch” on page 217
“TO resize a room by moving a wall (Sketch)” on page 218

TO CREATE AN ARCED WALL
Xactimate allows you to create an arced (curved wall).

1. From within an estimate’s Sketch window, create a straight wall that has the same corners as the arced wall you are creating.

   This can be a wall created by the wall tool or part of a room.

2. Highlight the wall and click the Properties icon.

   The Wall Properties window appears.
3. Under General, click the **Arced Wall** drop-down button and choose **Yes**.
   An Arc section appears in the **Wall Properties** window.

4. Click **[+] Arc** to expand the Arc section.

5. In the **Arc Distance** field, enter the distance that the apex of the arc extends from the straight line between the two corners of the wall.

6. Click away from the **Wall Properties** window to see the arc of the wall.

You can use this method to create a circular room, such as a turret or gazebo.

See also:
- “To create a simple room in Sketch” on page 211
- “To create an odd-shaped room” on page 210

**TO CREATE A BAY WINDOW IN SKETCH**
Xactimate has a Bay window tools that allows you to add a bay window to your sketch quickly and easily.

1. From within an estimate’s Sketch window, create a basic room.

2. Click the **Window tool drop-down button**.

3. Click **Bay**.
   The image of a bay window appears by the cursor.

4. Press **Tab** on your keyboard until the bay window is the proper orientation.

5. Move the bay window over the wall where you want to place it, then click the left mouse button to place it properly.

6. From here, you can adjust the length and angle of the walls by dragging the wall and corner handles.

See also:
- “To create a simple room in Sketch” on page 211

**TO CREATE A MACRO IN SKETCH**
To create a macro in Sketch,

1. Open an estimate and click the **Sketch** tab.

2. Click the **Macros button**.
   The **Macro SmartList** appears.
   If no macros have been created yet, the **Add Macro Item** window appears automatically; skip to step 4.

3. Click **Add**.
   The **Add Macro Item** window appears.

4. Type a code (you can create this code on the spot) and description for this macro.
   This code can be anything that makes it easy for you to remember what the macro does. For example, you could type **DOOR** to create a macro for adding an interior door.
5. Click the Line Item radio button.

6. Click the Cat and Sel SmartList buttons to select the category and selector codes for this line item you are adding to the macro.

7. Enter the calculation, depreciation, and coverage of this line item.

8. Click Add Tag if there are any tags you want to add to the line item, then add the type and value of the tag in the fields provided.

9. Click the Bold and/or Underline checkboxes if you want the line item to appear in bold or underlined in your estimates.

10. Click the OK button in the middle of the Macro Information window.

11. Repeat steps 5–10 until you've added all the necessary line items to your macro.

    If you choose to add a note instead of a price list item for step 5, type the text of the note in the field provided before clicking OK.

12. Click the OK button at the bottom of the Macro Information window.

See also:
   “To use a macro in Sketch” on page 221
   “To use Calculation wizards” on page 101

TO CREATE AN ODD-SHAPED ROOM

1. Open an estimate and click the Sketch tab. Create a simple room.

2. Deselect the room by clicking in an empty area of the workspace.

3. Select the corner you want to move by clicking it.
    A diamond-shaped handle  appears and the pointer changes into a four-headed arrow .

4. Click and drag the selected corner to its new position.
    Notice that, by default, the new angle will only change in increments of 22.5°. That is, as you drag a corner from a 90° angle, the next available angle will be 67.5°, followed by 45°.
    To select a different angle, hold the Shift key down as you move the corner. You can choose to change the angle of a single wall or of both walls in this fashion.

See also:
   “To create a simple room in Sketch” on page 211
   “To create an arced wall” on page 208

TO CREATE ROOM OFFSETS IN SKETCH

1. Open an estimate and click the Sketch tab. Create a simple room.

2. Click the Square Break button .
    As you move the mouse over the workspace, you can see the cursor become Square Break tool .
3. Mark the portion of a wall you want to move by clicking and dragging the square break tool along an existing wall.

When you release the square break tool, the wall segment you have defined displays a square handle at its mid-point and a black line at each end. Note that when you create a wall section, the portion(s) of the wall not selected also become segments, each with a square handle at mid-point.

4. Place the cursor over the square handle in the middle of the wall segment you want to move, then click and drag that portion of the wall away from the center of the room.

As you move the wall segment, dimensioning arrows display the width (or length) of the room offset you’re creating.

5. When you reach the desired dimension, release the cursor to complete the offset.

6. Repeat the process to reshape the room as needed.

**To create a simple room in Sketch**

1. Open an estimate and click the Sketch tab. Click the Room button and move the cursor over the workspace.

   The cursor changes into the room tool, and the outline of a 12’x12’ room appears.

2. Place the rectangular room tool where you want to place the top left corner of the room.

3. Click and drag the pointer to the opposite corner.

   You can use the grid or snap lines to determine the dimensions.

   If you click without dragging, Sketch creates a default room (12’x12’) to the lower right of the spot where you clicked.

4. Click the room, then click the Properties icon.

   The Room Properties window appears.

5. Type the name of the room in the Name field.

6. Select the type of room in the Type field.

7. Click OK.

   The room now is ready to have line items added to it if you have no further changes.

See also:

“**To resize a room by moving a wall (Sketch)**” on page 218

“**To create room offsets in Sketch**” on page 210

“**To create an odd-shaped room**” on page 210

“**To add joining rooms in Sketch**” on page 204

“**To add snap lines in Sketch**” on page 205
**TO CREATE A STAIRCASE WITH AN INTERMEDIATE LANDING IN SKETCH**

The Xactimate Custom Staircase tool allows you to create a set of stairs with a landing, whether the landing is straight, L-shaped, U-shaped, or Z-shaped.

To begin, you should make sure the staircase width, riser height, tread width, and wall type are correct.

1. From the estimate’s Sketch window, click the Tools menu and choose Preferences.
   The *Sketch Preferences—Estimating* window appears.

2. From the navigation tree on the left, click **Custom Staircase Defaults**, under *Place*.

3. Enter the width of the staircase.

4. Enter the height of each riser.

5. Enter the width of each riser.

6. Click the Default Wall Type drop-down to select the correct wall height: **Full** for a full wall above and below the stairs, **Missing (end to end)** for no wall either above or below the stairs, or **Missing Above Stairs** for a wall below the stairs but none above the stair-level.

7. Click **OK**.

To create this staircase, start from the Sketch lower level where the staircase begins.

1. Click the **Staircase drop-down button** and choose **Custom**, then move the cursor over the Sketch workspace.
   Sketch displays your cursor as a north/south-facing stair step.
   If your stair starts with an east/west-facing stair step, press **Tab** four times until the stair is facing east/west.

2. Position the step where you want it to be on the workspace, then click the left mouse-button.
   The dimensions of the staircase appear at the sides of the stair.

3. Move the staircase in the direction it goes up until you come to the exact length of the bottom set of stairs, then click the left mouse button.
   Xactimate draws the first staircase and adds the image of a square landing, the same width of the staircase.

4. Move your cursor to adjust the length or width of the landing, then click the left mouse button.
   This sets the dimensions of the landing and allows you to begin the next set of steps.
   If you do not want to adjust the dimensions of the landing, click the left mouse button **within** the default dimensions of the landing instead of moving it around.

5. Move the cursor in the direction of the next set of steps.
   You’ll see the length and dimensions of the steps as you move the cursor.

6. When the steps reach the correct length, click the left mouse button.
   Xactimate sets the length of the steps and adds the image of a new landing.

7. If this is the end of the staircase, move your cursor back over the top set of stairs and click the left mouse button.
   If this is not the end of the staircase, repeats steps **4–7** until you have finished your staircase.
TO CREATE A STAIRCASE WITH AN INTERMEDIATE LANDING USING TEMPLATES IN SKETCH

Sketch comes to you pre-loaded with templates to help you easily create a staircase with an intermediate landing. You can choose from regular (straight), L-shaped, T-shaped, or U-shaped.

1. From within the estimate, click the **Sketch** tab.

2. Click the **Stairs drop-down** and select one of the templates from the list.

   For example, if you select the “L” Shaped template, an L-shaped staircase with an intermediate landing appears.

   ![Image of L-shaped staircase with intermediate landing]

   An image of the template floats with your cursor.

3. Position the template on your Sketch floor plan and click the left mouse button to drop it.

   You can re-size the landing and staircases according to need.

   See also
   
   “To resize a room by moving a wall (Sketch)” on page 218

TO CREATE SUBROOMS IN SKETCH

To create subrooms in Sketch,

1. Open an estimate and click the Sketch tab. Draw the main room the subroom will be attached to, then sketch the room that will become the subroom.

   The subroom is traditionally, but not necessarily, adjacent to the room it is a subroom of.

   *Note: Subrooms cannot have spaces in their names.*

2. Double-click the name of the room that will become the subroom.

   The **Room Properties** window appears.

3. Click to place a checkmark in the **Subroom** checkbox.

   The **Subroom of:** field becomes active.

4. Click the **Subroom of: drop-down button** and select the room this subroom is being attached to.

5. Click **OK**.

   You will see a (1) to the right of the subroom name (assuming this is the first subroom attached to this room).

   Variables for the first room will now include those in the subroom.

   See also:
   
   “To create a simple room in Sketch” on page 211
**TO CREATE A TEMPLATE**

1. Open an estimate and click the Sketch tab.

2. Create a complex room or series of rooms that you want to save as a template.

3. Highlight the room(s) you’re saving as a template.

4. Click the **Save Template button** to see the **Save Template window**.
   The **Save Template** button is grayed out if you haven’t selected an item that can be saved as a template.

5. Type a name for this template, then click **OK**.

The template has now been saved in the **Template List**, where you can use it in other estimates.

See also:
“**To use a template**” on page 221

**TO CUT AND PASTE A ROOM IN SKETCH**

1. Open an estimate and click the **Sketch** tab.

2. Select the room you want to cut by clicking its name.
   The room handles and dimensions appear.

3. Choose **Cut** from the **Edit** menu.
   This deletes the room from the Sketch workspace and copies it to the Windows clipboard.

4. Choose **Paste** from the **Edit** menu.
   The pointer changes to indicate that it is ready to paste to the workspace. When you move the pointer over the workspace, an image of the room appears.

5. Click to place the room on the Sketch workspace.

**TO DELETE A LEVEL IN SKETCH**

1. Click the level tab at the bottom of the Sketch workspace to select the level you want to delete.
   That level appears in the Sketch workspace.

2. Click the **Edit** menu and choose **Delete** Level.
   Xactimate asks if you’re sure you want to delete the level.

3. Click **OK**.
   Xactimate deletes the level, along with all rooms and line items contained within it.

**TO DISPLAY ESTIMATING WINDOWS**

Xactimate allows you to hide and display your Sketch estimating panes (Search, Photos, and Item List). If your estimating panes are hidden and you want to retrieve them, you can do so in one of two ways:

1. From the **Sketch window**, click the **View** menu.

2. Highlight **Estimating Windows**.
3. Click the estimating window you want to appear.
   The estimating window appears in the Sketch window in the position where it appeared most recently.

You can also make all your estimating windows appear by the following:

1. From the Sketch window, click the View menu.
3. Click Reset to Default Layout.
   All three estimating windows (Search, Photos, and Item List) appear in their default positions.

**To Export a Sketch Drawing to AutoCAD**
You can use the Export DXF option (DXF is a file format compatible with Autodesk’s® AutoCAD®) to export a Sketch drawing from any of your estimates into AutoCAD. To do this, follow these steps:

1. Open an estimate and click the Sketch tab.
2. After creating a Sketch drawing, click the Tools menu, highlight Export, then choose Export DXF.
3. Select the Sketch level you want to export by clicking the drop-down button and selecting the level. Click OK.
4. Choose the location to save the file to by selecting a location in the DXF File To Save window.
5. Type the name of the file in the File Name field. Click Save.
6. To open the file in AutoCAD, launch AutoCAD and retrieve the file from the location you saved it in.

See also: “To export a Sketch drawing to BMP” on page 215

**To Export a Sketch Drawing to BMP**
You can use the Export BMP File (BMP is a bitmap file format compatible with Microsoft’s Paint or Picture or Fax Viewer programs) to export a Sketch drawing from any of your estimates into a BMP file. To do this, follow these steps:

1. Open an estimate and click the Sketch tab.
2. After creating a Sketch drawing, click the Tools menu, highlight Export, then choose Export BMP File.
3. Select the Sketch level you want to export by clicking the drop-down button and selecting the level. Click OK.
4. Choose the location to save the file to by selecting a location in the BMP File To Save window.
5. Type the name of the file in the File Name field. Click Save.
6. To open the BMP file, double-click on it from within your My Computer folder from your Windows desktop.

See also: “To export a Sketch drawing to AutoCAD” on page 215
**TO IMPORT UNDERLAY IMAGES**

The *Import Underlay Image* feature allows you to import a graphic into Xactimate’s Sketch that you can use as an underlay for your floor plan.

1. From within an estimate’s Sketch window, open the level you want to use the underlay for.

2. Click the **Tools** menu, highlight **Import**, then click **Import Underlay Image**.

   The *Select an Image File* window appears.

3. Find the image you want to use as an underlay, click on it, then click **Open**.

   A negative of the image appears in the *Import Underlay Image* window.

4. Set the scale of the graphic.
   
   a. Click a point on the graphic.
   b. Click a different point on the graphic.
   c. Enter the distance between the two points, then click **OK**.

5. Click **OK**.

   The graphic now appears as an underlay for the level you selected in **step 1**.

**TO MOVE ROOM LABELS IN SKETCH**

To move a room label,

1. Open an estimate and click the **Sketch** tab. Create a room, then move your cursor over the diamond ◆ in the room name.

   The room and label become red.

2. Press the **Spacebar** on your keyboard.

   The room turns blue.

3. Click the diamond next to the room label and drag the room label to the correct location.

**TO PLACE A DOOR ON A WALL IN SKETCH**

To place a door on a wall,

1. Open an estimate and click Sketch. Make sure the wall where you want to place the door already exists.

2. Click the **Door tool drop-down button** to select the type of door you want to add to the wall.

   You can choose standard, bi-fold, sliding, dutch, pocket, or overhead door types; you can also choose flush, paneled, french, louvered, and half-louvered door styles.

3. With the Door tool loaded onto the cursor (your cursor will look like this: ◈), click and drag the cursor along the wall until the door is the width you want it to be, then release the mouse button.

   The blue line on the wall displays the dimensions of the door as you draw them.

   *Note: You can also simply click on the wall to add a door that is defaulted to 2' 6" in width.*

4. With the door highlighted, click the **Properties button**.

   The *Doorway Properties* window appears.
5. Make sure the width, distance from floor, and height are correct.

6. Click the Double checkbox if the door is a double door.

7. Click the Right-hand or Left-hand radio buttons to indicate the direction of the door swing.

8. Click OK.

9. If necessary, click the Flip Horizontal or Flip Vertical buttons to change the direction of the opening.

**TO PRINT A 3-D VIEW OF A SKETCH DRAWING**

In order to print a 3-D view of your Sketch you will need to save the 3-D view, select that view from the Estimate Reports window and then print the estimate.

To do this, follow these steps:

1. From within an estimate, click the Sketch tab.

2. Click the 3-D view button 🏡.

3. Make any changes to the view, such as zooming in or out or rotating it.

   The 3-D image on your screen is the view that will print with the estimate.

4. Click the View menu and choose Save View.

   The Save View window appears.

5. Type a view name and click OK.

6. Click the Estimate menu and choose Print.

   The Estimate Reports window appears.

7. In the Estimate Reports window, select the report of your choice from the Report drop-down list 📊.

8. Click the Sketch tab.

9. Select the view(s) you want to print in the Views area, including the view you just saved.

10. Click the View or Print button.

   The view you selected will be printed when you print the estimate.

   Any view option that can be seen on your Sketch window (3-D, Framing, Footings, Elevation, etc.) can be saved as a view and printed with your report.

**TO RESHAPE A WALL SECTION IN SKETCH**

1. Open an estimate and click the Sketch tab.

2. Select the Add Vertex button 🏡.

3. Place the cursor on the wall you want to break.

   You can move it from one end of the wall to the other and view the dimensions of the two wall segments as they change.
4. When you have the cursor over the point you want to define as the break, click the left mouse-button. The broken wall now displays a diamond-shaped handle at the break point.

If you find it difficult to select the precise spot you need, you can use the **Zoom-In tool** to enlarge the area you’re working on.

5. Click and drag the wall handle to create the wall shape you need.

You don’t have to drag the handle in a straight line.

By default, the angle you create is limited to increments of 22.5°. Hold down the **Shift** key as you click and drag a vertex to override the angle constraint.

You can use the **Add Vertex** tool as many times as you need to further sub-divide wall segments, which can then be moved in a variety of ways.

See also:

*To "To create an arced wall" on page 208*

**TO RESIZE A ROOM BY MOVING A WALL (SKETCH)**

The simplest way to resize a room is to select a wall and drag it toward or away from the room’s center. This method moves only one wall at a time.

1. Open an estimate and click the Sketch tab.

2. Create a room, then click the **Select button**. Then click the wall you want to modify.

   The wall handle appears as a small square at the wall’s mid-point.

3. Place the pointer over the wall handle.

   The pointer changes to the grab tool .

4. Using the grab tool, click and drag the wall to the desired location.

   As you start to move the wall, the new dimensions of the room are displayed.

5. *(optional step)*

   Click one of the changing dimensions and type the correct length/width of the room, then press **Enter** on your keyboard.

   Xactimate adjusts the room to the correct dimensions. You can indicate feet/inches by the ' and " marks.

**TO ROTATE A PEAKED CEILING IN SKETCH**

To rotate a peaked ceiling in Sketch,

1. Open an estimate and click the Sketch tab.

2. Create a room, then make sure your room’s ceiling is peaked.

   To do this,

   a. Highlight the room, then right-click the room and choose **Properties**.

   b. Click the **Ceiling** tab.

   c. Choose **Peaked** in the **Type** field.

   d. Click **OK**.

3. Highlight the room.
4. Click the **Orientation button** 🎯.
   Your cursor will turn into a red arrow.

5. Move your cursor into the room and move it until it faces the direction where you want to peak to be.
   In most cases, the red arrow will need to be parallel to where the incorrect peak is.

6. Click your left mouse button.
   Xactimate moves the peak of the room to the correct orientation.

**TO TURN OFF THE NORTH ORIENTATION GRAPHIC IN SKETCH**
In order to move or turn off the North orientation graphic you must change settings from the View Properties window in Sketch. To do this, follow these steps:

1. Inside your estimate, click the **Sketch** tab.
2. Click on the **View** menu and select **View Properties**.
3. In the **View Properties** window, click the **Legend** tab.
4. Slide the bar underneath **Compass Rotation** to change the orientation of North.
5. To remove the legend completely, click the **General** tab and uncheck the **Legend** checkbox.
6. Click **OK** to save your changes.

**TO USE DISTO™ IN CONJUNCTION WITH XACTIMATE**
You can use Leica DISTO™ A6 (as well as its predecessor, the Leica DISTO Plus) to measure dimensions and enter those dimensions automatically into Sketch. To do this,

1. From the Xactimate Control Center, click the **System Settings** (for all users) or **User Preferences** (for yourself only) tab.
2. Click **System** under **Sketch General** in the navigation tree to the left of the window.
   The **System** page appears.
3. Under **Disto Laser Distance Meter**, place a checkmark in the **Enable Sketch/Disto Integration** checkbox.
4. Click the **Projects** tab, then open (or create) an estimate you are using DISTO on. Click the **Sketch** tab.
   The **Bluetooth** icon 📱 appears in the upper-right corner of the workspace. When this icon turns white, it means Xactimate has established a connection with DISTO.
5. Click the **Room drop-down button** and choose **Dimensions Rooms**.
   The **Room Dimensioning** window appears.
6. Select (or type) a name for the room, then click the **Shape drop-down button** to select the room shape.
   Xactimate modifies the **Dimensions** area to account for the shape of the room.
7. Press **Tab** on your keyboard.
   Xactimate moves the highlight to the first **Dimensions** field; in most cases, this is **Length**.
8. Use your DISTO measuring device to input the length of the room into this field, then press **Tab** on your keyboard.
9. Use DISTO to measure the requested dimension, then continue pressing Tab and entering your dimensions until you have finished entering room dimensions.

10. Click Insert Room.

   Xactimate adds the drawing of this room onto the Sketch workspace (you may not be able to see this sketch behind your Room Dimensioning window.

11. Repeat steps 6–10 to add all the rooms you need for this estimate.

   Xactimate adds all the rooms on your Sketch workspace. The room walls will not be merged, as is standard with Sketch.

12. After you have all your rooms entered, click Done.

   Your rooms will be laid out on the workspace in a grid pattern. From here, you can (if you choose) move them into position as they appear in the home, or simply work with them as they currently stand.

**TO USE THE EXISTING/PROPOSED FEATURE IN SKETCH**

In order to compare your proposed project to an existing structure in Sketch, you will need to turn on the Existing/Proposed option in the Sketch Preferences window. To do this, follow these steps:

1. Inside your estimate, click on the Sketch tab.

2. Click the Tools menu, then select Preferences.

   The Sketch Preferences—Estimate window appears with the Document page as the default. You can see the option for Enable Existing Proposed below Level Defaults.

3. Click to place a checkmark in Enable Existing Proposed checkbox.

   You can turn off the Existing/Proposed feature by removing the checkmark from the checkbox.

**TO SWITCH BETWEEN THE EXISTING AND PROPOSED VIEWS IN SKETCH**

Once you have turned on the Existing/Proposed feature, two tabs labeled Existing and Proposed will appear in the bottom right hand corner of your Sketch workspace.

1. Click the Existing tab.

   A large watermark image of the word Existing appears prominently on your Sketch.

2. Sketch the existing structure as it currently appears.

3. Click the Proposed tab.

   Xactimate asks if you want to transfer your existing rooms onto the proposed Sketch workspace.

4. Click Yes or No, depending on your needs.

   - If you select Yes, any rooms that have been sketched from the Existing window will copy over to the Proposed window.
   - If you select No, you can copy the existing floor plan to the proposed floor plan at a later time by clicking the Copy from Existing button.

   A watermark image of “Proposed” appears on your Sketch, regardless of the selection you choose.

5. When you print your Sketch drawing, the existing and proposed Sketch drawings are printed with your estimate report. In order to avoid confusion, the report will display the words Existing or Proposed after each level's name in the Sketch portion of a report.
**TO USE A MACRO IN SKETCH**

To use a macro in Sketch,

1. Open an estimate and click the **Sketch** tab.

2. Click the room or other Sketch object you want to add the macro to.
   
   You can hold the CTRL key on your keyboard to select more than one room/Sketch object.

3. Click the **Macros button**.
   
   If no macros have been created yet, the *Add Macro Item* window appears automatically.

4. Highlight the macro you want to place in the selected rooms and click **OK**.
   
   The items included in the macro are added to the selected rooms. Line items that use variables are automatically recalculated to match the current room or object dimensions.

5. Edit or remove any line items that don’t match the scope of your estimate.
   
   Double-click the line item in the Item List estimating pane and make your modifications in the *Item Properties* window. Remove items by highlighting them and pressing **Delete** on your keyboard.

See also:

“**To create a macro in Sketch**” on page 209

**TO USE A TEMPLATE**

1. Open the estimate you want to use the template in and click the **Sketch** tab.

2. Make sure you’re in the correct level of your Sketch drawing.

3. Click the **Load Template button**.
   
   The *Template List* window appears.

4. Highlight the template that you want to add to this estimate and click **Load**.
   
   An image of the room(s) appears at the cursor.

5. Move the cursor until the image of the room appears where you want to, then click the mouse button.
   
   The template is placed on the floor plan. You can now modify the item so that it fits into your floor plan.

See also:

“**To create a template**” on page 214
SYSTEM SETUP

TO CUSTOMIZE PROJECT DEFAULTS
You can customize the Project Defaults page for all users or for only the currently logged-in user.

1. From the Control Center main page, click the User Preferences tab (for the current user only) or click the System Settings tab (for all users).

2. Click Defaults on the navigation tree on the left.
   The Project Defaults page appears.

3. Click either the ZIP Code Matching or the Default Price List radio button.
   Xactimate uses ZIP Code Matching to select a price list for each estimate based on its ZIP code. If you select this option, skip to step 6.

4. Select the default price list you want to use for your estimates.

5. Select a default tax jurisdiction.

6. Select a price list filter to focus on price list items that are specific to your type of work.

7. Specify the labor efficiencies setting you want to use as your default.

8. Click the Apply BSC drop-down button to choose how you want to apply base service charges to your estimates.

9. Enter the Overhead and Profit percentages, and click the Cumulative O&P checkbox if you want profit calculated on your overhead.

10. In the Depreciation (Default) section, select your default depreciation options: whether or not depreciation is recoverable, and whether you want to depreciate by percent, dollar amount, or age.

11. Click the depreciation checkboxes to indicate if you will be using depreciation removal, if you want to include depreciation O&P, what will be depreciated, and the maximum depreciation percent.

12. If you want to use the settings for the default activity associated with price list items, click the Use price list defaults radio button. If you prefer to override the price list setting with a standard activity code for all items, click the Select radio button and click the attached SmartList button to choose the code of your choice from the Activity SmartList.

13. Select a company header to appear at the top of your printed estimates.

14. Select a default claim rep, reference, and contractor.

15. Select a default model statements for your opening and closing statements in your reports.

16. Click the checkboxes to indicate whether or not you want to use catastrophe codes, advanced payments, item description when replacing, distributed market conditions, and inspections.
17. Select your *Autosave* interval.

This determines how frequently your work is automatically backed up. You can choose any number of minutes from 0 to 30. Selecting 0 disables (turns off) the Autosave feature.

All estimates created from now on will now have these preferences. Most of these defaults can be overridden in the estimate itself.

See also:
“*To filter price lists* on page 181
“*To create a company header*” on page 105
“*To create a model opening statement*” on page 116

**TO TURN THE WASTE TOOL OFF**

The Waste Tool is set up to automatically calculate and add waste to carpet and flooring items in an estimate when you print or complete an estimate. Some companies have elected not to allow this feature to be turned on or off in their profile. However, most profiles do allow this change.

To turn off the Waste tool where it is allowed,

1. From the *Control Center main page*, click the *System Settings* tab.

2. Click *Inspection, Waste & Resequence Settings* on the navigation tree to the left.

3. In the *Calculate Waste On* section, make sure the *Save, Save As, Print, and Complete* checkboxes are *not* checked.

This turns off the Waste Tool for all estimates. If you are on a network, this turns off the Waste Tool for all workstations since this is a system-wide setting.

   **Note:** *It is important to remember that turning off the Waste Tool affects all of your estimates that have not yet been marked completed.*

To turn the Waste Tool back on, follow the steps above and re-check the boxes for *Print* and *Complete* in the *System Settings—Inspection & Waste Settings* page.
THIRD-PARTY
This section helps you learn about how to help Xactimate work with the following programs:

<table>
<thead>
<tr>
<th>▲ QuickBooks (page 224)</th>
<th>▲ ACT! (page 228)</th>
</tr>
</thead>
<tbody>
<tr>
<td>▲ Delorme Street Atlas (page 230)</td>
<td>▲ Microsoft Project (page 231)</td>
</tr>
<tr>
<td>▲ JobView (page 232)</td>
<td></td>
</tr>
</tbody>
</table>

**QuickBooks**

**TO SET UP XACTIMATE TO INTEGRATE WITH QUICKBOOKS**

In Xactimate version 27, you can export accounting information directly from Xactimate estimates into Intuit’s QuickBooks. To do this, you must first set up the integration between Xactimate and QuickBooks.


To set up Xactimate to be able to export into QuickBooks, follow these steps:

1. Make sure you have both Xactimate and QuickBooks installed on your computer, and that QuickBooks is set up to handle integrated applications (see the QuickBooks instruction manual or helps system for details on setting up QuickBooks to handle integrated applications).

2. Launch Xactimate.

3. From the Control Center main page, click the System Settings tab.

4. Click 3rd Party Setup from the navigation tree on the left.

5. Make sure QuickBooks is selected in the 3rd Party Applications field.

6. Click the Company to Use SmartList button.

   The Select a QuickBooks Company SmartList appears.

7. From the Select a QuickBooks Company SmartList, you can either select a company that has already been set up, or you can add a new company.

   To add a new company,
   a. Click the Add button.
   b. From the QuickBooks Company Setup window, enter a company name.
c. Enter the path of the QuickBooks company you anticipate linking to. You can also click the Browse button to find the path. If you accepted the default settings when you installed QuickBooks, this is C:\Program Files\Intuit\QuickBooks\Name_of_Company.qbw

d. Click the Connect button. The first time you set up Xactimate using this window, QuickBooks may ask you for permission to let Xactimate access its data. If your system appears to lock up when you click the first QuickBooks GL Accounts SmartList button, click the QuickBooks button on the Windows taskbar. This will bring the permission window (which was hidden behind the active Xactimate windows) to the front.

e. Click Yes, Always on the permission window to continue and to avoid this window in the future. You may then need to answer Yes again on a confirmation window.

f. Go back into Xactimate.

g. Select the default detail level you want to use when exporting your jobs. You can choose from project, category, or phase.

h. Under Transfer By, select whether you would like to transfer by account or by item.
i. Click the **Account Setup** or **Item Setup** button and link your Xactimate categories to their corresponding QuickBooks categories/items.

The **QuickBooks Accounts Setup** window allows you to link groups of Xactimate projects, categories, or divisions to QuickBooks accounts.

```
<table>
<thead>
<tr>
<th>Xactimate Category</th>
<th>QuickBooks Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Material</td>
<td>Accounts Payable</td>
</tr>
<tr>
<td>Equipment</td>
<td>Accounts Receivable</td>
</tr>
<tr>
<td>Market Conditions</td>
<td>Bank</td>
</tr>
<tr>
<td>Labor</td>
<td>Bank</td>
</tr>
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<td>Base Wages</td>
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<tr>
<td>Overhead</td>
<td>Bank</td>
</tr>
<tr>
<td>Direct Costs</td>
<td>Bank</td>
</tr>
<tr>
<td>Base Service Charge</td>
<td>Bank</td>
</tr>
</tbody>
</table>
```

To the left of the window are project/category/division groupings that can be linked to QuickBooks accounts.

j. Click your cursor in the right-hand column next to the grouping you want to link, then click on the drop-down list button.

A window appears, containing all the QuickBooks accounts that exist in your QuickBooks company.

```
<table>
<thead>
<tr>
<th>Account Name</th>
<th>Account Number</th>
<th>Account Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accounts Payable</td>
<td>3000</td>
<td>AccountsPayable</td>
</tr>
<tr>
<td>Accounts Receivable</td>
<td>1200</td>
<td>AccountsPayable</td>
</tr>
<tr>
<td>Bank</td>
<td>2000</td>
<td>Bank</td>
</tr>
<tr>
<td>Checking</td>
<td>3000</td>
<td>Bank</td>
</tr>
</tbody>
</table>
```

k. Highlight the account to link it to its associated Xactimate grouping.

l. After you’ve linked all the groupings to their associated accounts, click **OK**.

m. Choose whether or not you want taxes to be applied to your estimates when exporting to QuickBooks. If you choose **Yes**, you must also select a tax code for taxable and non-taxable items.

```
<table>
<thead>
<tr>
<th>Sales Tax</th>
<th>Taxable</th>
<th>Non Taxable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>No</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

n. Click **OK**.

Xactimate adds the new company to the **QuickBooks Company SmartList**.

8. Highlight the QuickBooks company you want to transfer Xactimate data to, then click **OK**.
9. Click the **Dashboard** tab (or any other tab within the Control Center), then click **Yes** when Xactimate asks if you want to save the changes.

For information about how to export data from an Xactimate estimate into QuickBooks, continue to the next topic.

**TO EXPORT DATA FROM AN ESTIMATE INTO QUICKBOOKS**

In Xactimate version 27, you can export accounting information directly from Xactimate estimates into Intuit's QuickBooks. To do this, you must first set up the integration between Xactimate and QuickBooks. See "To set up Xactimate to integrate with QuickBooks" on page 224 for information about how to set up Xactimate to integrate with QuickBooks.


To export data from Xactimate into QuickBooks, follow these steps:

1. Open QuickBooks and then open the company that will be receiving the estimate data from Xactimate.
2. In Xactimate, open the estimate you want to export data from.
3. Click on the **Estimate** menu and choose **Third Party Integration**, then select **QuickBooks Communicate**.
   
   Depending on your system settings, a window appears, allowing you to change your default settings from the **QuickBooks Communicate** window.
4. Click in the **QuickBooks Communicate** window.
5. Go to QuickBooks and click the **Cust** button in the toolbar.
6. Scroll through the customer list to find the customer you will be using and then right-click on the job name (listed just below the customer) you want to use. Select **Show Estimates** from the menu that appears.
   
   The Transactions of the Job will appear.
7. When this cursor appears, you can double-click on individual line items to drill down to see even more details in the estimate.

**TO SET UP QUICKBOOKS PRO TO AUTOMATICALLY OPEN WHEN TRANSFERRING ESTIMATES**

If you want QuickBooks Pro to automatically launch when communicating with Xactimate, you will need to change a setting in QuickBooks.

To do this, follow these steps: (The steps may vary according to your version of QuickBooks).

1. In QuickBooks Pro 2004, click the **Edit** menu, then choose **Preferences**.
2. Click the **Company Preferences** tab.
3. Click the **Integrated Applications** icon at the lower left portion of the window.
4. Highlight Xactware in the **Application Name** column and make sure there is a check in the **Allow Access** column on the left.

5. Click the **Properties** button.

6. Click the **Allow this application to login automatically** checkbox to place a checkmark in it.

7. Click **OK** in the **Properties** window.

8. Click **OK** in the **Preferences** window to save your changes.

Follow the above steps for each new company you create in QuickBooks that will receive estimate information from Xactimate.

**ACT!**

**To export contact data to ACT!**

1. From the Control Center, click the **Services** menu, then highlight **ACT!** and choose **Export to ACT!**. The **Select Estimates to Export to ACT!** window appears.

2. Select the estimate(s) you want to export contact data from and click **OK**. The selected estimate contact data is exported to ACT!

   **Note:** You can highlight more than one estimate by holding Ctrl while clicking on the estimate name.

If you receive an error when trying to import/export your contacts, go back to the Third Party Setup tab and make sure the information in this window is correct. If the information is correct, click the Apply to All and OK buttons again.
TO IMPORT SEVERAL ACT! CONTACTS INTO YOUR CONTACT MANAGER AT ONE TIME

1. From the Control Center, click the Services menu, then highlight ACT! and choose Import from ACT! The Select ACT! Contacts to Import window appears.

2. To select multiple contacts, drag your cursor down the list while holding your left mouse button down. You can also hold the Ctrl key down while you click to select multiple contacts that are not listed in sequence.

3. After you have selected the appropriate contacts, click OK. The selected contacts are now available in the Contact Manager.

See also:
“TO IMPORT A SINGLE CONTACT FROM ACT!” on page 229

TO IMPORT A SINGLE CONTACT FROM ACT!

1. From the Project SmartList in the Control Center, open the estimate that will receive the ACT! data.

2. Click the Claim Info tab.

3. Click the Tools menu, then highlight Import Client Information and choose From ACT!. The Select ACT! Contacts to Import window appears.

4. Select the contact you want to import from the SmartList and click OK.

See also:
“TO EXPORT CONTACT DATA TO ACT!” on page 228
“TO IMPORT A SINGLE CONTACT FROM ACT!” on page 229

TO INTEGRATE ACT! 2000 WITH XACTIMATE

Xactimate supports the transfer of contact data to and from ACT! 2000. If you use ACT! to manage your contact data, this feature eliminates the need to re-enter the same data into your Xactimate estimates and/or into ACT!.

To do this, you must have ACT! 2000 installed on the same computer as your Xactimate installation.

To set up the integration, follow these steps:

1. From the Control Center main page, click the System Settings tab.

2. Click 3rd Party Setup from the navigation tree on the left of the window.

3. Choose ACT! in the 3rd Party Applications field.

4. Click the Browse button next to the ACT! Database Path field to locate your ACT! data file. Consult your ACT! documentation if you need help locating this file.
5. Enter a name for the new Xactimate data field to be added to your ACT! data in the \textit{Xactimate Field} field. For example, you could name this field \textbf{Xactimate}.

6. Enter a default area code.

7. Click the \textbf{Dashboard} tab (or any other Control Center tab), then click Yes to confirm the changes.

You have now completed the setup process.

See also:
- \textit{To export contact Data to ACT!} on page 228
- \textit{To import several ACT! contacts into your contact manager at one time} on page 229
- \textit{To import a single contact from ACT!} on page 229

\textbf{DELORME STREET ATLAS}

\textbf{TO SEND A PROPERTY ADDRESS TO \textbf{DELORME STREET ATLAS USA}}

You can link Xactimate address data to Delorme Street Atlas versions USA 2006, 2007, 2008, or 2009 by using the Property Address Mapping feature in the Projects SmartList.

1. Launch Xactimate.

2. Click the Control Center \textbf{Projects} tab.

3. Right-click the estimate you want to send the property address from and choose \textbf{Property Address Mapping-DeLORME}.

   The \textit{Save Property Address Mapping Data} window appears.

4. Click \textbf{Browse}, to choose the path to the location where you want to send the address information.

5. Type a file name in the \textit{Save As} field.

6. Click the \textbf{OK} button.

   A message reads \textit{Property address data collected for 1 of 1 marked estimate(s). Launch mapping program?}

7. Click \textbf{Yes} to launch Street Atlas USA.

8. Click the \textbf{Create a New Map File} radio button, then click \textbf{OK}.

9. After Street Atlas USA has opened, click the \textbf{Draw} tab.
10. Click the **File** button.

11. Click the **Import** button.

12. Once the **Import Draw File** window appears, browse to the file you saved and click **Open**.

   *Note: Make sure **Address Book (*.csv; *.tab; *.txt)** is in the Files of Type field.*

**MICROSOFT PROJECT**

**TO SET UP MICROSOFT PROJECT**

Xactimate supports the transfer of estimate data to Microsoft Project. Before you can transfer the estimate’s information to Microsoft Project, the appropriate 3rd Party settings will need to be set up in Xactimate.

To do this, follow these steps:

1. In the **Control Center main page**, click the **System Settings** tab.

2. Click **3rd Party Setup** from the navigation tree at the left of the window.

3. Select **Microsoft Project** in the **3rd Party Applications** field.

4. Browse to a location where you want the Microsoft data to be saved.

5. Enter in an amount for the **Default Crew Size**.

   The amount you enter here will appear when transferring estimate information to Microsoft Project.

6. Click the **Dashboard** tab (or any other tab in the Control Center).

7. When you see the message that changes have been made, click **Yes**.

See also:

“**To transfer estimate information to Microsoft Project**” on page 232
TO TRANSFER ESTIMATE INFORMATION TO MICROSOFT PROJECT

Before you can transfer the estimate's information to Microsoft Project, the appropriate 3rd Party settings will need to be set up in Xactimate.

To transfer Xactimate estimate data to Microsoft Project, follow these steps:

1. From the Control Center's Projects window, open the estimate you are transferring to MS Project.
2. Click the Estimate menu and choose Third-party Integration, then select MS Project Communication.
3. Click and drag each division in the Project View window to move it to its desired location.
   Xactimate will transfer the estimate information to MS Project in that order.
4. Click OK on the Project View window.
5. On the Microsoft Project Communication window, enter in the correct crew size and start date.
6. Click OK.
   Microsoft Project opens and the appropriate data will be filled into the Gantt chart.
7. Click OK to close the completed window.
   Customizations can still be made at this point. You will simply need to change the values in the Duration, Start, Finish, or Predecessor columns.

If any of the columns in Microsoft Project contain “######” instead of the correct information, you will need to widen the column.

See also:
“To set up Microsoft Project” on page 231

JOBVIEW

TO SEND AN ESTIMATE TO JOBVIEW

Xactimate allows you to transfer job-related cost data directly to A-System's JobView.

1. From within an estimate, click the Estimate menu, then choose JobView Communicate.
   The JobView Communications window appears.
2. Select the company this estimate data will be sent to by clicking the Company drop-down button.
3. Select whether you want to break down the details by project or by category.
4. Under Customer, enter a new customer if this estimate belongs to a new customer, or click the Existing SmartList button and choose an existing customer.
5. Under Job, type the name of the new job (if this is a new job), or click the Existing radio button and choose the job by clicking the Existing drop-down button.
6. Click OK.
   Xactimate sends the estimate's relevant data to Job View.
USING SMARTLISTS
This section gives you some tips on using SmartLists:

<table>
<thead>
<tr>
<th>▲ To add a SmartList item (page 233)</th>
<th>▲ To delete a SmartList item (page 233)</th>
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</thead>
<tbody>
<tr>
<td>▲ To duplicate an item in a SmartList (page 233)</td>
<td>▲ To edit a SmartList item (page 234)</td>
</tr>
<tr>
<td>▲ To find a SmartList item (page 234)</td>
<td>▲ To sort the items in a SmartList (page 234)</td>
</tr>
</tbody>
</table>

TO ADD A SMARTLIST ITEM

1. From within an estimate, select the **Add** button from the desired SmartList.

   An *Add [item]* window appears.

   Note that not all versions of each SmartList have an *Add* button. If you have chosen a SmartList without an *Add* button, items cannot be added from that version of the list.

2. Enter all required information and click **OK**.

   Some *Add [item]* windows may themselves be associated with additional SmartLists. In a case like this simply click the SmartList button in each of these fields and select the appropriate item or add a new item as appropriate.

TO DELETE A SMARTLIST ITEM

1. From within the SmartList of your choice, select the item you want to delete.

2. Click the SmartList’s **Delete** button.

   Note that not all versions of each SmartList have a *Delete* button. If you have chosen a SmartList without a *Delete* button, items cannot be deleted from that version of the list.

3. Click **Yes** in the confirmation window to permanently delete the item.

TO DUPLICATE AN ITEM IN A SMARTLIST

1. From within an estimate, select the SmartList you want to duplicate an item from. Open the SmartList and select the item you want to duplicate.

2. Click the **Options** button.

3. Choose **Duplicate** from the *Options* menu.

   The *Duplicate* or *Add* window appears.

4. Enter the new name you’re assigning to the copy.

   The new name must be different from the original name.

5. If the duplicate window allows you to change other information as well, make any other necessary changes.

6. Click **OK**.

   The duplicate item appears in the SmartList.
TO EDIT A SMARTLIST ITEM

1. From within an estimate, select the SmartList you want to edit an item from. Open the SmartList and select the item you want to edit.

2. Click the **Edit** button.
   
   The **Edit** window appears.

   Note that not all versions of each SmartList have an **Edit** button. If you have chosen a SmartList without an **Edit** button, items cannot be edited from that version of the list.

3. Enter the new information.

4. When you’ve finished changing all the necessary fields, click **OK**.

TO FIND A SMARTLIST ITEM

1. From within an estimate, select the SmartList you want to find an item in. Open the SmartList and click the **Options** button.

2. Select **Search** from the **Options** menu.
   
   The **Search** window appears.

3. Enter the text of the item you want to find.

4. Click **Search Forward** or **Search Backward**.
   
   If an item exists in the SmartList that meets the search criteria, it appears highlighted in the list.

TO SORT THE ITEMS IN A SMARTLIST

1. From within an estimate, select the SmartList you want to sort items in. Open the SmartList and click the column header you want to sort your SmartList items by.

   The items in the SmartList are rearranged in ascending order (i.e. 1, 2, 3 or A, B, C) from top to bottom based on the column you selected. The active sort bar features an upward pointing triangular sort symbol.

2. To sort the selected items in descending order (3, 2, 1 or C, B, A), click again on the column header so that the sort symbol points downward.
XactAnalysis

The XactAnalysis section displays help topics for the following:

- To change your XactNet address (page 235)
- To download assignments (page 236)
- To receive data from another user (page 237)
- To request an uploaded assignment back from XactAnalysis (page 238)
- To upload assignments (page 239)
- To create a template message (page 236)
- To find your XactNet address (page 237)
- To register with XactAnalysis (page 237)
- To re-register with XactAnalysis (page 238)

To change your XactNet address

While there are very few reasons why you might want to change your XactNet address (rather than re-register an older address), Xactimate has an automated system that allows you to make this change.

1. From the Control Center main window, click the XactAnalysis menu, then choose Register.
   Xactimate warns you that your current XactNet address will be replaced.

2. Click Yes.
   The Pre-Registration window appears.

3. Click the I don’t have an XactNet address and need a new one radio button, then click OK.
   The License Agreement window appears.

4. Click the Accept button.
   The Online Registration window appears.

5. Type your company name, address, and phone information in the proper fields.

6. Type your e-mail address twice in the fields provided.

7. Type a contact name and your user name in the fields provided.

8. In the XactNet Address field, enter an XactNet address that you create.
   You can create this XactNet address on the fly, using a format such as COMPANYNAME.CITY or COMPANYNAME.USERNAME as the format for the address.

9. Click OK.
   Xactimate lets you know you’ve registered the new XactNet address successfully.

Note: In the unlikely event that the XactNet address you entered is already registered to another user, an error message appears, informing you that you have selected an invalid XactNet address. If this occurs, enter a different XactNet address (an abbreviation of your company name, for example) and click OK.

See also:
“To register with XactAnalysis” on page 237
“To re-register with XactAnalysis” on page 238
TO CREATE A TEMPLATE MESSAGE
From the Control Center Dashboard window,

1. Select **Messages** from the drop-down list in the XactAnalysis Communications pane.

2. Click the **Add** button.
   The New Mail window appears.

3. Type the text of the template message in the **Message** text box.

4. Choose **Save** from the **Template** menu.
   The Template Information window appears.

5. Type a name for this template, then a description to remind you of the purpose of this template.

6. Click **OK**.

The text is now saved as a template. You can send or delete the message in the New Mail window as necessary.

TO DOWNLOAD ASSIGNMENTS
In Xactimate, assignments can be downloaded when you are connected to the Internet.

If you have received a notification that an assignment has been sent,

1. Establish an Internet connection.

2. Launch Xactimate.

3. From the Dashboard window (the first window that opens when you launch Xactimate), make sure you can see **Inbox** in the top right corner of the XactAnalysis Communications pane.

4. Click **Connect** at the upper right corner of the Control Center main page.
   Xactimate connects to XactAnalysis and downloads any assignments sent to your XactAnalysis address.
   If you do not receive the assignment, you may need to have your XactAnalysis address changed to a qualified address. For instructions on how to change your XactAnalysis address, click [here](#).

5. Highlight any assignments you have received and click **Accept** to send them to the Projects SmartList.

   **Note:** Make sure you are in the correct profile when locating the assignment in the Projects SmartList. To change the profile you are using, click the **Services** menu and select **Change Profile**.

You can only receive and upload assignments on a computer that has a qualified XactAnalysis address. Registering your XactAnalysis address and verifying with the carrier that your address has been qualified ensures that you can receive assignments.
TO FIND YOUR XACTNET ADDRESS
Your XactNet address was created when you (or someone using this computer) registered with XactAnalysis the first time. If you were not the person who created this address, or you have forgotten it, you can follow these steps to determine your XactNet address.

1. From the Control Center, click the Help menu and choose About Xactimate.
   The About Xactimate window appears. Your XactNet address appears near the bottom of this window.

   See also:
   “To change your XactNet address” on page 235

TO RECEIVE DATA FROM ANOTHER USER
To receive data, the receiver must do the following:

1. Make sure you are connected to the Internet.
2. Open Xactimate to the Control Center Dashboard window (this will be the first page that appears when you first launch Xactimate).
3. Click the drop-down button from the top of the XactAnalysis Communications pane. Select Inbox.
4. Click Connect at the top right of the Control Center main page.
5. Highlight the data you have received and click the Accept button.
   The data will then be accepted into the same profile it had been sent from.

   See also:
   “To transfer data to another user” on page 134

TO REGISTER WITH XACTANALYSIS
To register with XactAnalysis,

1. From the Control Center main page, choose Register from the XactAnalysis menu.
   The Pre-Registration window appears.
2. Click the I don’t have an XactNet Address and need a new one radio button, then click OK.
   Then the License Agreement window appears.
3. Click the Agreement Link button.
   Your default web browser opens, and the XactAnalysis Subscription and Software Usage Agreement appears.
4. Read through this agreement, then close your web browser, return to the License Agreement window, and click Accept.
5. Type your company name, address, and phone information in the proper fields.
6. Type your e-mail address twice in the fields provided.
7. Type a contact name and your user name in the fields provided.
8. In the XactNet Address field, enter an XactNet address that you create.
   You can now create this XactAnalysis address, using COMPANYNAME.CITY or something similar as the format for the address.

9. Click OK.
   Xactimate lets you know you've registered successfully.

   *Note: In the unlikely event that the XactNet address you entered is already registered to another user, an error message appears, informing you that you have selected an invalid XactNet address. If this occurs, enter a different XactNet address (an abbreviation of your company name, for example) and click OK.*

**TO REQUEST AN UPLOADED ASSIGNMENT BACK FROM XACTANALYSIS**
To request an assignment, use the Request Data feature to download the assignment from XactAnalysis.

1. From the Control Center main page, click the XactAnalysis menu and choose Request Data.
   The Request Data from XactNet window appears.

2. Select the profile you want to request data for.

3. Click Completed Estimate.
   The Completed Estimate Request window appears.

4. Type the claim number for the estimate you want to request and click OK.

5. Click Request.

6. Click OK at the request confirmation window.
   The request now appears in your XactAnalysis Outbox.

7. Make sure you have an Internet connection.

8. Click Connect near the top right of the Control Center main page.
   This sends your request to XactAnalysis, where it is processed and the requested assignment is returned.

9. In the XactAnalysis Communications window, go to the XactAnalysis Inbox.
   You will see the previously uploaded assignment.

10. Highlight the assignment and click Accept to move it to the Projects SmartList, where it can be modified.

**TO RE-REGISTER WITH XACTANALYSIS**
To re-register your XactAnalysis address with XactAnalysis, you must first have an XactAnalysis address you have previously used to register with XactAnalysis.

1. From the Control Center main page, click Register with XactAnalysis near the upper-right corner.
   The Pre-Registration window appears.

2. Click the I already have an XactNet Address and want to recover it radio button.
   The Existing Registration Options portion of the window becomes active.
3. Click the **Enter e-mail address associated with previous XactNet Address** radio button.

4. Type the e-mail address used to register with Xactware the last time it was registered, then click **OK**.

5. Click **OK** at the Xactware window to confirm that you received its message.
   
   Within a few minutes, Xactware will send a message to the e-mail address you entered. This e-mail message will contain a security code.

6. Highlight and copy (**Control-C**) this code in your e-mail program, then return to Xactimate.

7. Click **Register with XactNet** again.
   
   The **Pre-Registration** window appears again.

8. Click **I already have an XactNet Address and want to recover it**, then click **Enter previously sent security code to complete registration**.

9. Type the e-mail address you entered the first time you saw the **Pre-Registration** window, then type (or paste) the security code into the appropriate field.

10. Click **OK**.
    
    Xactware displays a **Registration was successful** message.

11. Click **OK**.
    
    You are now registered with XactAnalysis.

See also:

"**To register with XactAnalysis**" on page 237

"**To change your XactNet address**" on page 235

**TO UPLOAD ASSIGNMENTS**

If you have completed an assignment and you are ready to upload it to XactAnalysis, follow these steps:

1. Establish an Internet connection.

2. If you haven’t changed the status of the project to **Completed**, click the Projects tab to open the Projects SmartList.

3. Right-click on the project, highlight **Change Status**, then choose **Complete**.

4. Click the Control Center main window tab.

5. Click **Connect** near the top right of window.

   Xactimate connects to XactAnalysis and uploads any items in the XactAnalysis Outbox.

You can only receive and upload assignments on a computer that has a qualified XactAnalysis address. Registering your XactAnalysis address and verifying with the carrier that your address has been qualified ensures that you can receive assignments.