Xactimate Tips, Tricks & Shortcuts
Thursday, February 17, 2011

Jim Kowalski
Owner at Kowalski Construction Inc.
Agenda

- Welcome and introductions
- Presentation of tips, tricks, and shortcuts
  - User Preferences
  - Macros
  - Keyboard shortcuts
  - Customized price lists
  - Price List Filters
  - Price List & Searches
  - Summary Estimating
  - Global changes wizard
  - Sketch tips & techniques
  - Modifying component costs
- Questions and Answers
User Preferences

- Setup defaults and avoid entering the same information every time
  - Project View
  - Project Filter Search
  - Company Headers
  - Opening Statements
  - Closing Statements
  - Sketch Construction defaults - per region/zip code
Includes 3 patio post replacement and fascia on East & West ends of patio.
## Project – Filter Search

### Project Filter/Search

- **User ID:**
  - All
  - Select: JMK

- **Profile:**
  - All
  - Current (Contractor)
  - Select: 

- **Project Types:**
  - Estimates
  - Assignments
  - Valuations

- **Status:**
  - In Progress
  - Completed
  - Reassigned
  - Closed

- **Date Range:**
  - All
  - From: / / 
  - To: / / 
  - Past: --- days

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### Filtered Search:

- **Any Field:**

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### All Projects

<table>
<thead>
<tr>
<th>Project</th>
<th>Client</th>
<th>Label</th>
<th>Status</th>
<th>Type</th>
<th>Job Type</th>
<th>Grand Total</th>
<th>ID</th>
<th>File Number</th>
<th>Profile</th>
<th>Creation Date</th>
<th>Last Modified Date</th>
<th>Home Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>1137-01-S-MC01</td>
<td>AMCO/Mesa Royale St. Ap...</td>
<td>Completed</td>
<td>Estimate</td>
<td></td>
<td></td>
<td></td>
<td>JMK</td>
<td>Contractor</td>
<td>9/19/2009 9:07 PM</td>
<td>9/19/2009 9:36 PM</td>
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<td></td>
</tr>
<tr>
<td>10488-01-S-C01</td>
<td>Ambroius, Jers/Tagnerrine...</td>
<td>Completed</td>
<td>Estimate</td>
<td></td>
<td></td>
<td></td>
<td>JMK</td>
<td>Contractor</td>
<td>4/1/2008 9:25 AM</td>
<td>4/1/2008 9:49 AM</td>
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<td></td>
</tr>
<tr>
<td>10488-01-S-MC01</td>
<td>Ambroius, Jers/Tagnerrine...</td>
<td>Completed</td>
<td>Estimate</td>
<td></td>
<td></td>
<td></td>
<td>JMK</td>
<td>Contractor</td>
<td>2/13/2008 9:20 AM</td>
<td>2/15/2008 8:12 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10488-01-S-MC02</td>
<td>Ambroius, Jers/Tagnerrine...</td>
<td>Completed</td>
<td>Estimate</td>
<td></td>
<td></td>
<td></td>
<td>JMK</td>
<td>Contractor</td>
<td>2/15/2008 8:41 AM</td>
<td>2/15/2008 9:11 AM</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10480-01-S-MC01</td>
<td>BANS/Morgan Park Apt...</td>
<td>Completed</td>
<td>Estimate</td>
<td></td>
<td></td>
<td></td>
<td>JMK</td>
<td>Contractor</td>
<td>2/14/2008 1:01 PM</td>
<td>2/15/2008 7:59 AM</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
User Preferences – Add Charges
User Preferences - Loss
User Preferences - Statements
User Preferences – Sketch - Construction

Configure construction defaults per region/postcode
User Preferences – Sketch – Construction – Footing Defaults
User Preferences – Sketch – Place – Door & Window Defaults
Macros

- The fastest way to scope a claim
- Utilizing Macros for Notes & Specifications
Keyboard Shortcuts

- Hands on the keyboard speedup data entry
- Navigate from screen to screen
- Quick Entry – built for hands on searching and item entry
- Sketch – all tools have shortcuts

Shortcuts are listed in the helps
Real Time Training

Alt + L  Opens the Language menu at the top of the estimate window.

Alt + T  Opens the Estimate menu at the top of the estimate window.

Alt + V  Opens the View menu at the top of the estimate window.

Alt + W  Opens the Windows menu at the top of the estimate window.

Ctrl + E  Jumps to the Estimate Items window.

Ctrl + I  Jumps to the Claim Info Insured Info window.

Ctrl + K  Jumps to the Sketch window.

Ctrl + P  Jumps to the Parameters window.

Ctrl + S  Saves the estimate.

Ctrl + T  Prepares a Summary Report for the estimate you are working in.

Ctrl + W  Jumps to the Work Order feature

Shift + F7  Opens the Estimate Reports window. You can print the estimate from this window.

Ctrl + Shift + G  Opens the Images window.

For information on keyboard shortcuts in Xactimate’s Sketch window, click here.
<table>
<thead>
<tr>
<th>Toolbar button</th>
<th>Keyboard Shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>0</td>
<td></td>
<td>draw ellipse</td>
</tr>
<tr>
<td>1</td>
<td></td>
<td>Plan view</td>
</tr>
<tr>
<td>2</td>
<td></td>
<td>Elevation view of a selected wall</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>3-D View</td>
</tr>
<tr>
<td>A</td>
<td></td>
<td>Place a reference area</td>
</tr>
<tr>
<td>B</td>
<td></td>
<td>Square break</td>
</tr>
<tr>
<td>C</td>
<td></td>
<td>Create or place a staircase</td>
</tr>
<tr>
<td>D</td>
<td></td>
<td>Place a door</td>
</tr>
<tr>
<td>F</td>
<td></td>
<td>Place a roof</td>
</tr>
<tr>
<td>G</td>
<td></td>
<td>Set scale</td>
</tr>
<tr>
<td>J</td>
<td></td>
<td>Turn real time calculations off</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Turn real time calculations on</td>
</tr>
<tr>
<td>K</td>
<td></td>
<td>Walk-through mode</td>
</tr>
<tr>
<td>L</td>
<td></td>
<td>Place a reference line</td>
</tr>
<tr>
<td>M</td>
<td></td>
<td>Place a missing wall</td>
</tr>
<tr>
<td>N</td>
<td></td>
<td>Change Orientation</td>
</tr>
</tbody>
</table>
## Keyboard Shortcuts

You can use Quick Entry to scope an estimate without ever moving your hands from the keyboard by using the following keyboard shortcuts:

<table>
<thead>
<tr>
<th>Keyboard Shortcut</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>CTRL + Q</td>
<td>Takes you to Quick Entry</td>
</tr>
<tr>
<td>CTRL + Enter</td>
<td>Adds a new row</td>
</tr>
<tr>
<td>F2</td>
<td>Allows you to modify the contents of a cell</td>
</tr>
<tr>
<td>F5</td>
<td>Displays the associated SmartList or contents of a drop-down button</td>
</tr>
<tr>
<td>F9</td>
<td>Allows you to add a line item note</td>
</tr>
</tbody>
</table>
Customized Price Lists

- Updating Xactimate line items in your customized price lists
- Price list filters – View and search only the items you need

Create specialized filters for roofing, water mitigation, contents cleaning, etc.

Filters can include entire categories or just the specific items from a category you work with.
Customized Price Lists – Compare & Merge
Price List Filters

» Only view and search through the items you need
Price List Search

When you’re not sure which Category to use
Summary Estimating

- Adding/editing items across multiple rooms
Global Changes Wizard

- Make estimate wide changes from one location
- Accessed in Grouping (select your rooms to modify)
- Make changes to:
  - Coverage type
  - Factor costs by activity
  - Modify Settings for tax/non-tax, O&P/non O&P, repaired by, or add a price note
  - Add/remove/modify tags
  - Depreciation settings
  - Change CAT/SEL
Global Changes Wizard – Taxes/O&P/Repaired
Global Changes Wizard – Depreciation
Sketch – Underlay – Multi-story

- Using the Sketch Underlay tool to speed room creation
Sketch – Underlay – Same Level
Graphical Estimating

- Quick ways to graphically estimate multiple rooms
Graphical Estimating - Categories
Graphical Estimating - Division
Graphical Estimating - Reference
Sketch Templates

- Save and reuse templates
- Online Template Gallery – search and use templates created by others
Sketch Templates
**Sketch Templates - Online**

Version: 2.7.0

Submitted By: Xartware

Comments: A gable roof plan with double garage with double raised gables and multiple offsets. Includes offset hip building and a large gazebo roof and turret.

Tags: Roof, Roofs, Multiple, Gable, Offsets, Gazebo
Modifying Component Costs

- Modify a material or labor rate for all items from one location

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
<th>Taxable</th>
<th>Status</th>
<th>CS</th>
<th>Quantity</th>
<th>Unit</th>
<th>Unit Price</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>DRY1/2</td>
<td>Gypsum board, 1/2”</td>
<td>Taxable</td>
<td>Yes</td>
<td></td>
<td></td>
<td></td>
<td>$0.200</td>
<td>156.66</td>
</tr>
<tr>
<td>DRYCBEAD</td>
<td>Metal corner bead</td>
<td>Taxable</td>
<td>Yes</td>
<td>36.93</td>
<td>SF</td>
<td>$0.199</td>
<td>7.35</td>
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<tr>
<td>DRYMUD</td>
<td>Drywall joint compound</td>
<td>Taxable</td>
<td>Yes</td>
<td>2.31</td>
<td>BX</td>
<td>$8.320</td>
<td>19.26</td>
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</tr>
<tr>
<td>DRYN</td>
<td>Drywall nails [based on 25_</td>
<td>Taxable</td>
<td>Yes</td>
<td>1.75</td>
<td>LB</td>
<td>$1.547</td>
<td>2.71</td>
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<tr>
<td>DRYSCREW</td>
<td>Drywall screws - grabber</td>
<td>Taxable</td>
<td>Yes</td>
<td>3.51</td>
<td>LB</td>
<td>$1.987</td>
<td>6.97</td>
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</tr>
<tr>
<td>DRYTAPE</td>
<td>Perfortape - 500 roll</td>
<td>Taxable</td>
<td>Yes</td>
<td>0.45</td>
<td>RL</td>
<td>$3.105</td>
<td>1.40</td>
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<tr>
<td>ELEB&amp;P1</td>
<td>Electrical box - non_</td>
<td>Taxable</td>
<td>Yes</td>
<td>6.00</td>
<td>EA</td>
<td>$1.109</td>
<td>6.65</td>
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</tr>
<tr>
<td>ELECOVER</td>
<td>Outlet or switch cover</td>
<td>Taxable</td>
<td>Yes</td>
<td>5.00</td>
<td>EA</td>
<td>$0.540</td>
<td>2.70</td>
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<tr>
<td>ELEOS</td>
<td>Outlet, 15 amp - residential</td>
<td>Taxable</td>
<td>Yes</td>
<td>4.00</td>
<td>EA</td>
<td>$0.676</td>
<td>2.70</td>
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</tr>
<tr>
<td>ELEOSSS</td>
<td>Switch, 15 amp -</td>
<td>Taxable</td>
<td>Yes</td>
<td>1.00</td>
<td>EA</td>
<td>$0.669</td>
<td>0.67</td>
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<tr>
<td>ELEW110</td>
<td>110 volt copper wiring</td>
<td>Taxable</td>
<td>Yes</td>
<td>126.31</td>
<td>LF</td>
<td>$0.242</td>
<td>53.55</td>
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<tr>
<td>HVDCO</td>
<td>Cold air return cover, 24”x_</td>
<td>Taxable</td>
<td>Yes</td>
<td>0.13</td>
<td>EA</td>
<td>$19.926</td>
<td>2.66</td>
<td></td>
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<tr>
<td>HVDCCT20×16</td>
<td>Ductwork - galvanized_</td>
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<td>Yes</td>
<td>1.63</td>
<td>LF</td>
<td>$8.230</td>
<td>13.43</td>
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<td>HVDCCT24×8</td>
<td>Ductwork - galvanized_</td>
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<td>Yes</td>
<td>2.01</td>
<td>LF</td>
<td>$5.540</td>
<td>11.11</td>
<td></td>
</tr>
</tbody>
</table>
Questions and Answers

Thank You