

12 EASY STEPS

QUICK STEPS TO BUILDING AN ESTIMATE

This quick and easy step-by-step guide is designed to help start you building your estimate. Please refer to any and all manuals and on-line help options for additional help. This is reference materials only. Estimate set up illustrated herein may need to be changed in order to meet your specific estimating needs. It is the responsibility of the user to insure that they have their estimate set up properly. AdjustersTraining.com does not assume any responsibility for your estimates.

I. Open your Xactimate ® program.

II. Click on PROJECTS TAB

- On the Project Tab, Click on ADD. This will open a PROJECT WINDOW.
- Name the project.

III. Click on CLAIM INFO

- INFO SECTION - Fill out the INFO section of the insured.
- DATES - Enter applicable claim dates.
- PERSONNEL – Enter in the claim rep information
 - Estimator should be same as claim rep.
 - Enter mortgage information.
 - Enter REFERENCE Company (the name of the claim service company you work with).
 - Enter applicable loan number.

IV. Click on COVEARGE/LOSS TAB.

- LOSS SECTION – Fill out Claim number.
 - Fill out Policy Number
 - Fill out type of loss.
 - Specific Cause of Loss (if applicable).
 - Enter applicable policy dates, Initial coverage's.
- POLICY TYPES: Choose Homeowners or Commercial
- APPLY DEDUCTIBLES: Choose Across all coverage's, or Coverage Specific.
- COVERAGES – Choose coverage's, deductibles, and sublimit.
- Apply limits (if applicable).

V. Click on PARAMETER

- PRICING SECTION
 - Choose price list.
 - Enter sales tax jurisdiction.
 - Activity : Use price List Defaults
 - Repair by: Contractor
 - Labor Efficiency: Restoration/Service/Remodel
- ADD ONS:
 - Set Overhead & Profit (if applicable)/
 - Set Salvage (if applicable).
 - Set defaults for depreciation & depreciation options.
- COVER TEXT
 - Enter Cover Text (Insurance company as letterhead)
 - Enter Opening Statement (legal disclosure on first page of estimate).

VI. Click on SKETCH

- SKETCH YOUR ROOF(S)
- SKETCH YOUR ROOMS
You may Sketch your roof and diagram your rooms or you can dimension rooms, elevations, or other areas through dimensioning tools on the ESTIMATE ITEMS tab.

VII. Click on ESTIMATE ITEMS

- Add areas of damages (not covered in the SKETCH drawings).
- Dimension areas (elevations, rooms, and other areas).

VIII. BUILD YOUR ESTIMATE

- Click on the area you want to build out in the GROUPING section on the ESTIMATE ITEMS tab. This will activate the area that you can add line items to right side of the page under LINE ITEMS.

IX. PHOTOS – Click on “IMAGES” on the top right hand side of the Xactimate® screen. This will open the IMAGE screen. You may want to do photos first prior to building your claim out. This may provide help while you build out your claim by reviewing the images.

- Click on the LOAD IMAGES Button. This will open a Microsoft window that will allow you to browse and search pictures. Select the file folder where you stored your images. You can select one photo or hold down the CTRL (Control Button) which will allow you select individual photos. If you use CTRL – A, you will select all photos in the file folder. Click the OPEN button and all photos selected will be loaded into your to your IMAGES for this estimate.
- Label your photos.
- Click OK to close and save images imported.

- X. **PRINT ESTIMATE** – Click on “PRINT” on the top right hand side of the Xactimate® screen. This will open the PRINT screen in order to choose an estimate format.
- Choose the IMAGE tab to select the number of photos per page.
 - PRINT ELECTION - Select the parts of the estimate you would like to include by checking the options.
 - Choose to VIEW or PRINT the estimate.
 - OPTIONAL – Select the EMAIL tab and select PDF option. Click on export. A Microsoft window will open up. You will be able to browse and select where you want to save it. Select the folder. This will allow you to name/rename the estimate to a unique name. Click SAVE and the estimate will be saved as a PDF in your target file.
- XI. **MARK COMPLETE** - When your estimate is complete, you may click on COMPLETE and mark your estimate as COMPLETE. If there are any errors, this screen will indicate what items you will need to correct prior to completing. Once all items are corrected, click on SAVE & EXIT.
- XII. **DATA TRANSFER** – Once estimate is completed and saved, you can data transfer it out of Xactimate ®. This will be a live ESX file. While on the PROJECT tab, simply click and highlight the estimate without opening it. With the estimate highlighted, click on the OPTIONS button on the right side of the page. A window will open up. Click on DATA TRANSFER. The Data Transfer window will open. Click on SEND and then choose to browse in order to select the target directory. Click OK. Xactimate ® will make a copy of the estimate as a “live file” in the target director.