Which Xactimate Class Is Right For Me?

Xactware Training offers you three different types of Xactimate Training, each designed with a different level of user in mind.

- Xactimate Fundamentals
    - This class introduces you to the 4-Step Estimating Process
    - This course will prepare you to take the Level 1 Certification exam
    - Skill Level: new users
- Xactimate Proficiency
    - The class expounds on the 4-Step Estimating Process and goes into more detail
    - This course will prepare you to take the Level 2 Certification exam
    - Skill level: intermediate
- Xactimate Mastery
    - This class teaches you various tips and tricks for getting the most out of Xactimate
    - This course will prepare you to take the Level 3 Certification exam
    - Skill level: Advanced

It is important that you select the right training for your skill level. Signing up for the wrong class can be a discouraging experience when it feels like you're the only one asking questions or the rest of the class seems to understand concepts that are beyond you. To help you choose the correct training for you, read the statements below and answer each question for yourself.

Computer Knowledge

Yes No Statement

- ☐ ☐ I feel comfortable using computer that runs Windows.
- ☐ ☐ I know how to toggle between computer programs, either by using the Windows taskbar or by pressing Alt-Tab, and I am comfortable doing this.
- ☐ ☐ I am comfortable using a mouse and understand the difference between a left-click and right-click. I also know how to drag and drop with the mouse.
- ☐ ☐ I know how to launch a program, either by double-clicking an icon or using the Start menu.
- ☐ ☐ I know how to minimize windows.
- ☐ ☐ I know how to use the Internet Explorer or Chrome browsers, including opening new tabs in the browser.
- ☐ ☐ I can create a new folder on my Windows desktop.
- ☐ ☐ I know how to send an email with an attachment added to it.

If you answered No to more than two of these questions, then the Xactimate Fundamentals course is right for you.

Basic Xactimate Knowledge

Yes No Statement
- ☐ ☐ I know how to launch Xactimate.
- ☐ ☐ I understand the 4-Step Estimating Process.
- ☐ ☐ I understand how to use the SmartList button and the drop-down list button.
- ☐ ☐ I understand how tabbed pages are used in Xactimate, and know how to switch between them: For example, I can click on the Sketch page, then move to the Estimate Items page, and then to Complete, etc.

Which Xactimate Class Is Right For Me? (Cont.)

- ☐ ☐ I know how to open an estimate and move between the tabs in Xactimate.
- ☐ ☐ I know how to enter claim info into the Insured Info and Coverage/Loss tabs.
- ☐ ☐ I know how to download a current price list.
- ☐ ☐ I can add O&P to an estimate.
- ☐ ☐ I can add company headers to a report.
- ☐ ☐ I can draw and correctly dimension a room in Sketch, and use the Square Break tool to change its shape.
- ☐ ☐ I can add a straight staircase to an estimate using either the Regular option or the Custom option.
- ☐ ☐ I know how to view a sketch in 3D.
- ☐ ☐ I understand the purpose of room variables and know how to use them when entering line items.
- ☐ ☐ I can add line items to an estimate using both the reference search and the keyword search methods.
- ☐ ☐ I know how to print an estimate report in Xactimate, such as the Final Draft report.
- ☐ ☐ I can draw a basic gable roof in Sketch.
- ☐ ☐ I know how to add an overbuild/tie-in to an estimate's roof.
- ☐ ☐ I know how to download a current price list.
- ☐ ☐ I understand the difference between the Top-down and Bottom-up methodologies of pricing.
- ☐ ☐ I understand the Xactware price list naming conventions and can generally identify the price lists assigned to different areas.

If you answered No to more than three of these questions, you should try out the Xactimate Fundamentals course; it teaches you how to perform all of these functions and more. The Xactimate Proficiencies course assumes you understand most of these functions and builds upon them.

Intermediate Xactimate Knowledge

Yes No Statement
- ☐ ☐ I know how to add contacts to the Contact Manager, and how to import one into Claim Info.
- ☐ ☐ I understand how to set up depreciation in the Parameters tab.
- ☐ ☐ I can create an opening statement and can use tokens in my report text.
- ☐ ☐ I know how to adjust a room's ceiling type and height, and how to change its orientation.
- ☐ ☐ I understand the Properties windows and how to use them to adjust rooms and staircases.
- ☐ ☐ I can use the Square Break tool to create a room offset/jog.
- ☐ ☐ I can use Vertex tool to create an angled wall.
- ☐ ☐ I can use the Wall tool to add a knee wall.
- ☐ ☐ I know how to use the Control key to add multiple items in Sketch.
- ☐ ☐ I can add reference areas and reference blocks, and I know how to use them when calculating line items.
- ☐ ☐ I know how to add multiple levels to a sketch and use Auto-Below to activate an overlay.
- ☐ ☐ I can add images and annotations to my sketch.
- ☐ ☐ I know how to use Related-Item Search, Similar-Item Search, and Category Search to add line items to an estimate.
- ☐ ☐ I can use the Retrieve Scope feature to add line items to a room in an estimate.
- ☐ ☐ I know how to enter different coverage types for individual line items in an estimate.
- ☐ ☐ I know how to add notes to a line item.
- ☐ ☐ I can apply depreciation options to individual line items in an estimate.
- ☐ ☐ I know how to add notes to a line item.
- ☐ ☐ I know how to use Subvariables and Calculations to enter correct line item amounts.
- ☐ ☐ I know how to calculate waste for carpet, vinyl sheet goods, and roofing shingles.

Which Xactimate Class Is Right For Me? (Cont.)

- ☐ ☐ I know how to make global changes to an estimate's depreciation.
- ☐ ☐ I know how to add multiple slopes to a roof.
- ☐ ☐ I know how to change roof shapes.
- ☐ ☐ I understand how to use the Flooring tools to adjust the lay of carpeting and vinyl flooring.
- ☐ ☐ I can use the Item Property editor to add roofing waste.
- ☐ ☐ I know how to manually calculate waste.
- ☐ ☐ I understand the differences in an estimate's status.
- ☐ ☐ I know how to find and correct inspection violations.
- ☐ ☐ I know how to duplicate a project.
- ☐ ☐ I know how to merge two projects.
- ☐ ☐ I understand how to use the Recycle Bin.
- ☐ ☐ I know how to enter project defaults.
- ☐ ☐ I can download a historical Xactware price list as well as a current Xactware price list.
- ☐ ☐ I understand how to send pricing feedback to Xactware.
- ☐ ☐ I know how to adjust components and supporting events to change the costs of line items.
- ☐ ☐ I understand labor minimums and how to calculate them.
- ☐ ☐ I know how to create, save, and use macros to enter line items into an estimate.
- ☐ ☐ I know how to create, save, and use Sketch templates to add standard Sketch items to an estimate.

If you answered No to more than five of these questions, you should probably take the Xactimate Proficiencies course. You should know how to do these before you take the Xactimate Mastery course.

Advanced Xactimate Knowledge

Yes No Statement

- ☐ ☐ I know how to add insurance sublimits as part of an estimate's coverage.
- ☐ ☐ I know how to calculate salvage for an estimate using both Lump Sum and Line Items Sum.
- ☐ ☐ I know how to adjust labor burden for an estimate.
- ☐ ☐ I can record advance payments for an estimate.
- ☐ ☐ I know how to add additional charges to an estimate.
- ☐ ☐ I understand how to use Tags in Xactimate.
- ☐ ☐ I know how to reposition the viewable panes in Sketch.
- ☐ ☐ I can add a new Sketch tab to view multiple sketches within the same estimate.
- ☐ ☐ I know how to use the Display sections of the Sketch Properties windows to customize my sketches.
- ☐ ☐ I know how to import a floor plan from an underlay.
- ☐ ☐ I know how to draw an arced wall.
- ☐ ☐ I can create curved stairs, angled treads, and flared stairs.
- ☐ ☐ I know how to draw an arced wall.
- ☐ ☐ I can create curved stairs, angled treads, and flared stairs.
- ☐ ☐ I know how to add a room below a stairway.
- ☐ ☐ I know how to stack windows in the elevation view in Sketch.
- ☐ ☐ I understand how to use reference areas to adjust variables in the elevation view.
- ☐ ☐ I can make global pricing changes to coverages, taxes, O&P, depreciation, etc.
- ☐ ☐ I can add additional coverage based on upgrades to code.
- ☐ ☐ I understand when to use the Paid When Incurred function.
- ☐ ☐ I know how to create an item scenario to upgrade line items in a claim.
- ☐ ☐ I know how to build the footprint of a large structure.
- ☐ ☐ I can add a roof that spans multiple levels of a building.

Which Xactimate Class Is Right For Me? (Cont.)

- ☐ ☐ I know how to create a bay roof or a fan roof in Sketch.
- ☐ ☐ I know how to use the Item Property Editor to account for carpet patterns, unusual widths, and stair steps.
- ☐ ☐ I know how to adjust Sketch to view the bearing walls, framing, and footings.
- ☐ ☐ I know how to add construction costs for walls, footings, staircases, and roofs.
- ☐ ☐ I know how to create exterior walls from a building's roof.
- ☐ ☐ I can draw a home's exterior elevation.
- ☐ ☐ I understand how to copy information from one project to another.
- ☐ ☐ I understand the purpose of default preferences and know how to change them.

If you answered No to more than ten of these questions (but yes to the previous sections), you're ready to take the Xactimate Mastery course.

If you answered Yes to most of these questions, congratulations! You're an Xactimate Pro!