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**Xactimate Level 1 and Level 2 Certification Training Course**

**November 14 - 15, 2022 | Greensboro, NC**

**Learning Objectives**

**Level 1**

The Level 1 Certified individual will be required to demonstrate that the following learning objectives have been met:

* Demonstrates understanding of the 4-step estimating process, connecting to XactAnalysis, downloading assignments, Projects tab, Control Center.
* Demonstrates understanding of Claim Information including: insured name, multiple addresses/phone numbers, estimator/reference info, policy/claim info, deductible, price list, tax jurisdiction, activity defaults, overhead and profit, company header.
* Can complete and print an estimate in Xactimate.
* Demonstrates understanding of Sketch windows, Tools, Search pane, Sketch workspace, Items section, View Tools, Plan View, Zoom to Selection, Zoom In, Zoom to Extents, Pan Tool, 3-D View.
* Demonstrates understanding of Room Features, such as Wall Handle, Wall Thickness, Interior/Exterior Dimensions, Room Properties, Ceiling Type/Height, Square Break Tool, Custom Staircase Tool, Doors, Windows, Sign/Click and Drag method, Deduct Openings, Missing Walls, Basic Room Variables F, PF, W, WC, C PC.
* Demonstrates understanding of Estimate Items, Quick Entry, Grouping, Search/ Macros, Category code, Selector code, Activity, Description, Calculation, Unit Price, Unit of Measure, Click for Detail, Reference/Keyword Search, Home Link, Predictive Text.
* Demonstrates understanding of marking an estimate “Completed,” required information, changing estimate status to “Completed,” Print Options, View/Print Reports, Export/Email PDF File, types of Estimate Reports.
* Demonstrates understanding of Measurement View, Measurement Locks, Roof Annotations, Roof Tool, Roof Properties, Roof Types, such as Gable, Flat/Shed, Hip, Partial Hip, Dutch Hip, Half Hip, Gambrel, Barrel, Turret, Manual, Square Break Tool, Roof Overbuild, Roof Subgroup, basic roof variables SQ, SF, P, R.
* Demonstrates understanding of the Projects tab, Xactimate Help, Data Transfer, Sharing/Copying Data such as estimates, price lists, and macros.
* Demonstrates understanding of the three methods for updating prices, price list updates, naming convention of a price list.

**Level 2**

The Level 2 Certified individual will be required to demonstrate that the following learning objectives have been met:

* Demonstrates understanding of Claim Info, Contact Manager/Import from Contacts, Parameters, Depreciation Options, Tokens, Opening and Closing Statements.
* Demonstrates understanding of Room Properties, Relation to Level, Ceiling Type, Orientation Tool, Sketch Staircases, Square Break Tool (click + drag method), Vertex Tool, Wall Tool, Reference Areas and Blocks, Missing Wall, Room Variables LL, HH, SH, V.
* Demonstrates understanding of Multiple Levels, Level Properties, Sketch Options (measurements, font size, reset window views, keyboard shortcuts), Sketch Images Window/Add/Load Digital Images, Sketch Image Reference, Annotation Ribbon.
* Demonstrates understanding of Grouping Members (Append, Insert, Attach), Quick Entry, Search for Line Items, Retrieve Scope, Coverage Association, Depreciation Options, Dwelling Coverages, Activity Information, Miscellaneous Items, Line Item Attachments, Subvariables/Calculations, Calculate Waste (F\*1.15), Global Changes Wizard.
* Demonstrates understanding of Estimating from Sketch, Estimating Windows, Searching for Line Items, Selecting Surface Areas, Adding Items Graphically, Floor Covering Tools, Sketch Items List.
* Demonstrates understanding of Estimate Items Window, Quick Entry Method, Quick Entry Navigation, Column identification.
* Demonstrates understanding of Estimating in Sketch, Item Information Window, Common Roofing Materials, Adding Roofing Line Items in Sketch, Calculating Waste for Roofing Shingles, Manually Calculating Waste SQ\*1.15.
* Demonstrates understanding of Locking/Unlocking Roof Measurements, Roof Properties (Roof Rafters, Ridge, Span), Multiple Roof Slopes and Shapes, Roof Overbuilds, Commercial Roof Shapes, Roof Variables VAL, HIP, EAVE, RAKE.
* Demonstrates understanding of Elevation Grouping Member, Dimensioning an Elevation, Adding Line Items to Grouping Members, Variables Association, Reference Search on Exterior.
* Demonstrates understanding of Change Estimate Status from In Progress to Completed, Complete, Submit Required Information, Correct Inspection Violations, Mark Estimate Completed, Print Report, Upload Assignment.
* Demonstrates understanding of Project Preview, Duplicating/Copying Projects, Quick Copy, Merge Projects, Save and Save As, Re-sequence Line Numbers, Recycle Bin, Project Defaults.
* Demonstrates understanding of Download Historical Price Lists, Provide Pricing Feedback, Components, Supporting Events, Labor Minimums vs. Base Service Charges, Price Changes.
* Demonstrates understanding of Creating Macros, Retrieving Macros, Pre-built Macros in Sketch, Sketch Templates (use existing, rotate, flip).
* Demonstrates understanding of Data Transfer types, such as projects, price lists, company headers, model statements, contacts, and references; Version Compatibility, Transfer Type: Folder, XactAnalysis, Cloud, Can drag and drop (send) data, Can choose to skip, merge/rename, or overwrite items.
* Demonstrates understanding of Print Reports, Estimate Reports, Info Tab, Print Options, Line Item Detail, Sketch Images, Claim Reports, Documents, Report Macros, Uploaded Documents, Additional Options, Language Selection, Take-off Reports, Print Images on Report.