Xactimate X 1 User Guide

Xactimate X 1 User Guide *Downloaded from* everybodystreet.com *by Sara & Jacobs*

INTRODUCTION TO THE XACTIMATE X1 USER GUIDE

The restoration and insurance estimating industry has evolved dramatically over the past decade, and Xactimate has remained the gold standard for property damage estimates. With the launch of **Xactimate X1**, the latest iteration of this powerful software, professionals now have access to a streamlined, cloud-based platform that combines accuracy, speed, and mobility. Whether you are a seasoned adjuster, a restoration contractor, or a newcomer to the field, having a reliable **Xactimate X1 User Guide** is essential to unlocking the full potential of this tool. This comprehensive guide will walk you through the key features, workflows, and best practices—all designed to help you create precise estimates efficiently while avoiding common pitfalls. By the end of this article, you will feel confident navigating the X1 interface, building estimates from scratch, and leveraging advanced functionalities to boost your productivity.

GETTING STARTED WITH XACTIMATE X1

Before diving into detailed estimating, it is important to understand the foundational setup of Xactimate X1. Unlike its desktop predecessor, X1 is built on a modern web-based architecture, meaning you can access your projects from any device with an internet connection. This shift towards cloud computing allows for real-time collaboration, automatic updates, and secure data storage. To begin, you will need to log in to your Xactimate account through the official portal. Once inside, the dashboard presents a clean, intuitive interface with quick links to recent projects, templates, and training resources.

System Requirements and Accessibility

Xactimate X1 runs entirely in your browser, so there is no heavy software to install. Most modern browsers such as Chrome, Firefox, Edge, or Safari are fully supported. For optimal performance, ensure you have a stable internet connection and that your browser is up to date. The platform is mobile-responsive, allowing you to work on tablets and smartphones, which is a game-changer for field estimators who need to capture data on-site. If you encounter any issues, the built-in help center and community forums are excellent resources for troubleshooting.

NAVIGATING THE XACTIMATE X1 INTERFACE

Understanding the layout of X1 is crucial for efficient workflow. The main screen is divided into three primary areas: the project tree on the left, the central workspace, and the property details panel on the right. The project tree organizes all elements of your estimate—including rooms, line items, sketches, and documents—into a hierarchical structure. You can drag and drop items to reorder them, making it easy to group related tasks. The central workspace is where you build your estimate, view sketches, and adjust pricing. Finally, the property details panel allows you to set project-specific information such as address, claim number, and policy details. Spend a few minutes exploring these areas to familiarize yourself with the tooltips and context menus.

Customizing Your Dashboard

One of the standout features of Xactimate X1 is the ability to personalize your workspace. You can create custom templates for commonly used estimates, save frequently accessed line items, and adjust the display units (e.g., square feet vs. linear feet). To customize your dashboard, click on the gear icon in the upper right corner. From there, you can choose which modules appear on your home screen, such as recent estimates, pending approvals, or training videos. This level of personalization reduces clutter and helps you focus on what matters most: accurate estimates.

CREATING YOUR FIRST ESTIMATE IN XACTIMATE X1

Now that you are comfortable with the interface, it is time to create an estimate. The process in X1 has been redesigned to be more intuitive than previous versions. Start by clicking the "New Estimate" button. You will be prompted to enter basic claim information such as the policyholder's name, property address, and insurance carrier. Once the project is created, you can begin adding rooms and line items.

Adding Rooms and Line Items

In Xactimate X1, estimates are organized by room or area. To add a room, simply click "Add Room" and name it accordingly (e.g., "Living Room" or "Kitchen"). Within each room, you can add line items that represent the work to be performed. The line item catalog is extensive, covering categories like demolition, framing, drywall, flooring, painting, and more. You can search for items using keywords or browse by category. Each line item includes default pricing based on your region and the current Xactimate price list. You can adjust quantities, apply overhead and profit, and add notes as needed. One helpful tip: use the "Quick Add" feature to rapidly insert common line items without navigating multiple menus.

Using the Sketch Tool

The sketching capabilities in Xactimate X1 have been significantly enhanced. The sketch tool allows you to create floor plans, elevations, and detailed diagrams directly within the estimate. To access it, click on the "Sketch" tab within a room. You will find a palette of drawing tools including lines, arcs, rectangles, and measurement annotations. The software automatically calculates square footage and perimeter as you draw, which updates the line item quantities in real time. For example, if you draw the walls of a room, X1 can automatically generate line items for drywall, paint, and baseboards. This integration between sketching and estimating saves hours of manual data entry and reduces errors.

PRICING AND LINE ITEM MANAGEMENT

Accurate pricing is the backbone of a reliable estimate. Xactimate X1 uses the latest PRICE (Pricing Reference for Insurance Claims Estimating) database, which is updated regularly to reflect current labor and material costs. When you add a line item, the software automatically assigns the default price based on your location. However, you have full control to override pricing if necessary—for instance, when using specialty materials or subcontractor rates. To modify a price, simply click on the price cell and enter your own value. X1 will flag overridden prices so you can review them later.

Applying Labor and Material Adjustments

In addition to base pricing, X1 allows you to apply adjustments for labor difficulty, material waste, and regional multipliers. You can also add overhead and profit percentages at the project level or per line item. For complex claims, consider using the "Workflow" feature to set up sequential tasks that automatically calculate dependent quantities. For example, if you remove carpet, the workflow can automatically add line items for floor preparation and new flooring installation. This dynamic linking ensures that your estimate remains consistent and comprehensive.

ADVANCED FEATURES IN THE XACTIMATE X1 USER GUIDE

To truly master X1, you should explore its advanced capabilities. These features are designed to handle complex claims, improve collaboration, and streamline reporting. Below are some of the most powerful tools available.

Photo Integration and Documentation

Xactimate X1 allows you to attach photos directly to line items or rooms. This is invaluable for justifying scopes of work during the claims process. You can take photos using your mobile device, upload them from your computer, or even capture screenshots from the sketch tool. Each photo can be annotated with notes, circles, or arrows to highlight damage. The software also supports document uploads such as contracts, invoices, or adjuster notes. All media is stored securely in the cloud and can be included in final reports.

Collaboration and Sharing

Cloud-based X1 excels at collaboration. You can invite team members—such as project managers, adjusters, or subcontractors—to view or edit an estimate. Permissions can be set to read-only or full edit access. This is particularly useful for large restoration companies where several estimators work on the same claim. Additionally, you can share estimates with clients or insurance carriers via a secure link. The recipient does not need an Xactimate license to view the estimate; they simply open the link in their browser. This transparency builds trust and speeds up approval cycles.

Generating Reports and Invoices

Once your estimate is complete, X1 offers a variety of report templates. The most common is the "Detailed Estimate Report," which lists every line item with quantities, unit prices, and totals. You can also generate summary reports, scope sheets, or proposal letters. All reports are fully customizable—you can add your company logo, change fonts, and select which sections to include. For invoicing, X1 can export estimates to QuickBooks or other accounting software via CSV or PDF. This integration ensures that your billing is accurate and aligned with the estimate.

TIPS AND BEST PRACTICES FOR USING XACTIMATE X1

Even with a comprehensive **Xactimate X1 User Guide**, experience is the best teacher. Below are some practical tips to help you work smarter, not harder.

- **Leverage Templates:** Save time by creating templates for common jobs like water damage, fire restoration, or roofing. Include frequently used line items and default sketches.
- **Use Keyboard Shortcuts:** X1 supports many keyboard shortcuts such as Ctrl+S to save, Ctrl+Z to undo, and Ctrl+C/V for copy/paste. Learning these can speed up your workflow significantly.
- **Regularly Sync Your Data:** Since X1 is cloud-based, changes are saved automatically. However, it is good practice to manually sync after major edits to ensure nothing is lost.
- **Attend Training Webinars:** Xactimate offers free live webinars and recorded tutorials. These sessions cover new features and advanced techniques.
- **Double-Check Regional Pricing:** Always verify that your X1 account is set to the correct geographic region. Pricing can vary by state or even by zip code.

CONCLUSION

Mastering the **Xactimate X1 User Guide** is not just about learning a piece of software—it is about elevating your professionalism in the restoration and insurance industry. X1 empowers you to create precise, defensible estimates with unprecedented ease and speed. From its intuitive sketching tools to its robust collaboration features, every aspect of X1 is designed to save you time while reducing

errors. By following the steps outlined in this guide, you will be well on your way to becoming an X1 power user. Remember, consistent practice and ongoing learning are the keys to success. Whether you are estimating a small water loss or a large commercial fire, Xactimate X1 gives you the confidence to deliver accurate results every time. Start exploring today, and watch your estimating efficiency soar.