QUICK REFERENCE FLOORING TOOL

- PREFACE:

The flooring tools are used in Sketch to view the cuts, diagrams, and dimensions of carpet and vinyl materials. These tools are located at the bottom View Toolbar in Sketch. Among the tools available are Show Flooring Overlay, Show Flooring Cuts Windows, and a tool located at the top toolbar called Direction to lay floor covering.

The Show Flooring Overlay tool lets you see the different types of flooring and seam placement in a graphically estimated Sketch floor plan. If the seams are running in the wrong direction, you can use the Floor Covering Direction tool to change the direction.

The Show Flooring Cuts button displays the Flooring Cuts window, which shows you important flooring information including carpet cuts, material, quantity, and waste percentages. You can only see the information for flooring added in the Sketch window; you cannot see flooring data for line items added in the Estimate Items window.

In addition to the flooring view tools, the Floor Covering Direction tool allows you to specify the direction of a floor covering after it has been placed on the Sketch workspace.

** Important: The following must be done from Sketch. This procedure will not work if items are added from Estimate Items

- Procedure

1. Add Item To Room From Sketch:

   a. Using the search window on the left side of the screen search for carpet or vinyl flooring. Once you have located the desired item click on it once. This will load the item to your cursor.

   b. Move your cursor over to the sketch page. Notice the banner describing the selected item. This banner will provide useful information on the task at hand. Once over the sketch page right click to access the item properties. From this window you will be able to change the activity of the item. Set the activity and then click ok.

   c. Move your cursor over to the middle of the room you want to add the item. The room will turn green and the banner will show “Quantity: floor”. Click once to add the item to the room. Clicking a second time will delete the item from the room.
2. Turning on Show Flooring Overlay Option

Turning on the “show flooring overlay” will allow the user to see in which room carpet/vinyl floor covering has been added, the cuts of carpet and the direction the carpet is laid.

a. From the lower left toolbar click on the “show flooring overlay” button.

b. Notice your sketch now include additional information
   i. The arrow in the room represent the direction the carpet was laid
   ii. each cut of carpet is labeled by a letter
3. Show Flooring Cuts Window

The following option will allow the user to gain more information about the roll of carpet/vinyl, the size of each cut and the waste generated.

a. From the bottom left toolbar click on the “Show flooring cuts window” icon
b. The top part of the show flooring cuts window display the roll of carpet and the cuts that are used from the roll
c. The bottom left side of the screen display the size of each cut of carpet
d. The bottom right side display information about the waste generated with this specific layout

Configuring the properties of the item

This section will describe how to modify various properties such as: changing the width of the roll, assigning a SKU, Setting the overcut, setting the maximum fill pieces, using scraps and the direction to lay floor covering.

4. Changing The Room Flooring Properties

a. Select a room for which you would like to change the flooring properties (make sure carpet or vinyl is already added to this room).
b. Right click on the room and access the properties window
c. From the properties window you will see a section labeled “flooring”. Click on the + sign to display this section. From this screen the user will have access to the following
To modify any of those options simply click on the desired option and input the appropriate value.

5. To Change the Width Of a Roll and Assign a Sku:

   e. Select the carpet/vinyl item from the item list.  
      *Note: when adding carpet/vinyl from sketch 2 items will be added to your estimate, one for the removal and one for the replacement. Make sure to select the item with the replace activity (+)*
   
   f. Once you have selected the item click on the property editor *(Blue box beside the item description)*
   
   g. Set the width of the roll from the “material width” option
   
   h. Assign the SKU
Note: assigning a SKU to the roll of carpet will allow Xactimate to calculate the waste and cuts of this roll separately. This is useful when varying types/colors of carpet are being used in the same estimate.

6. Direction To Lay Floor Covering

Changing the direction to lay the floor covering will or can impact the number of cuts, the size of each cuts and the waste.

i. Make sure the “show flooring overlay” option is on
   (Step #2)

j. From the upper toolbar locate and click on the “direction to lay floor covering” button

k. Move your cursor to the room that has carpet/vinyl added to it

l. Move close to a wall, notice the big red arrows. They represent the direction to lay the floor covering.

m. Select the right layout and click once. The layout will automatically update.

n. Open the “show flooring cuts window” to gain more detailed information about the new layout.
7. Printing and Saving a PDF

This section will show the user how to print or save a digital copy of the flooring tool report.

a. Click on the show flooring cuts window.
b. From the lower left corner of the window click on the "View Report" button.
c. A PDF document will open. To print click on: File > Print
d. To save digital copy click on: File > Save
8. Attaching The Flooring Report To An Xactanalysis Claim

This section will explain how to add the flooring report to a XactAnalysis claim. Adding this document to the claim will make sure this information is then uploaded to XactAnalysis. Once the claim is uploaded to XactAnalysis the flooring report can be found under the documents tab of the claim.

a. Save the flooring report has a PDF (Step #7)
b. Open the print window
c. Navigate to the documents tab
d. Select the Attached doc sub-tab
e. Click on Add
f. Find the flooring report on the computer and click ok.
g. Click ok again to close the print window

9. Sending a Claim Back To XactAnalysis

Once the estimate is complete and the flooring report has been attached to the claim (step 8) the estimate can be uploaded to XactAnalysis. This is a very important step in the claim process.

a. Click on the complete tab
b. Fill out all the required information
c. Click on "Change estimate status to completed"
d. Save And Exit
e. Navigate to the control center > dashboard
f. Click on connect (internet connection required)
10. Saving Or Printing A Final Draft Report That Includes The Flooring Report

This section will explain how to include the flooring report in the final draft report. *(The Final draft is the complete estimate report)*

a. Click on print
b. Navigate to the sketch tab
c. Click on the option “Print Flooring Cuts Diagram”
d. Click on Print to have a hard copy
e. Click on Export > Export PDF File to save the document in digital format