XactScope®

User's Guide

Version 27.5

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XACTWARE

Chapter 1
XactScope Version 27.5 System Requirements

System Requirements

XactScope

iDevice
(i.e. iPhone 4 or newer, iPad 2 or newer; iPod Touch not supported)

- All devices will require a data plan with their mobile provider that allows access to the internet.
- Users will be required to be on Xactimate Professional version 27.5 or higher.
- The mobile device will require the iOS version 5.0 or higher.

XACTWARE

Chapter 2
XactScope Version 27.5 Installation Instructions

INTRODUCTION

This chapter walks you through the installation and registration of XactScope. It provides you with step-by-step instructions for installing and registering XactScope on your iDevice. By following the instructions in this chapter, you should have XactScope installed and ready to use in no time at all.

NOTE REGARDING INSTALLATION AND DISTRIBUTION

XactScope will be published as a free application on the existing application stores available for each device. Once installed, you will be required to register before you are able to access price lists, enter items or export Scope.

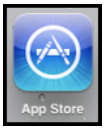
Note: *Before installing XactScope on your iDevice, it is critical that your device meets the minimum system requirements for XactScope. These requirements are listed in "System Requirements" on page 3.*

XactScope Installation

The XactScope application can be downloaded from the App Store from your iOS Device. This is a free application, but you will be required to register before you are able to access price lists, enter items or export estimates.

Make sure you have an active connection to the Internet.

1. From your iDevice, select **App Store.**



2. Locate and install **XactScope 27.5**.

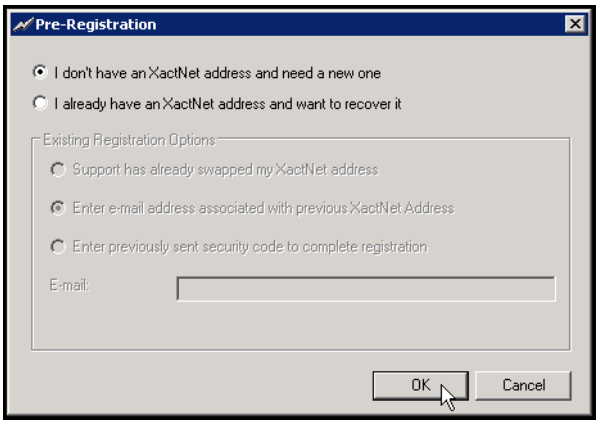
Once the download and installation is complete, an XactScope Icon will appear on your iDevice.

CREATING AN XACTNET ADDRESS

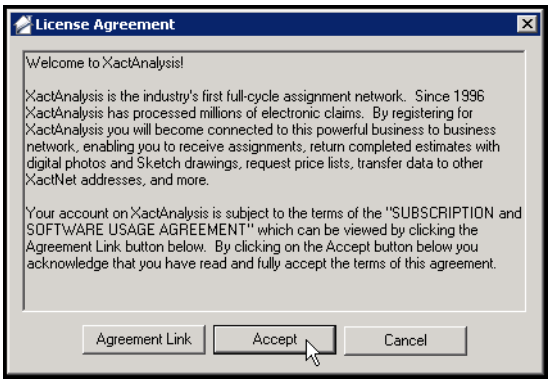
Before registering XactScope with Xactimate, you will need to create an XactNet address and connect to XactAnalysis. If you have already created an XactNet address and connected to XactAnlysis, you can move to the next section, Registering XactScope with Xactimate. If you haven't already created an XactNet address and connected to XactAnalysis, the following instructions will demonstrate how to do this.

1. Open Xactimate.
2. At the bottom of the Control Center tab is the XactAnalysis Communications area. Click Register on the right side of the window.

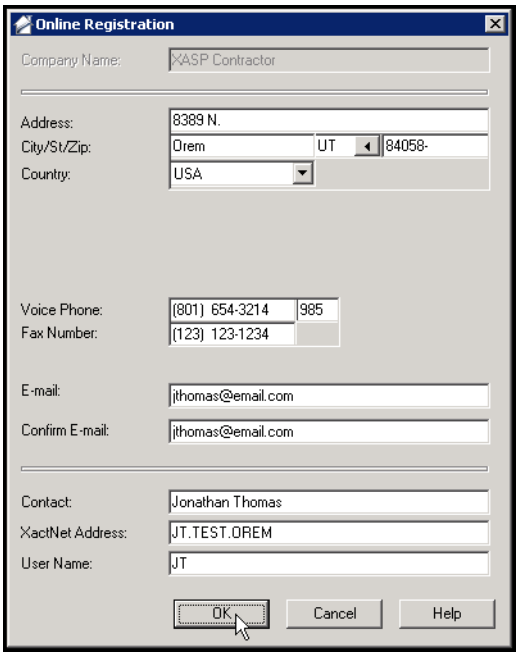
3. The Pre-Registration window will appear. If you already have an XactNet address and you need to recover it, select the '**I already have an XactNet address and want to recover it**' radio button and select one of the three radio buttons in the Existing Registration Options section.
4. If you need to create a new XactNet address, select the 'I don't have an XactNet address and need a new one' radio button and click OK.



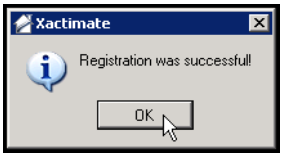
5. The License Agreement window will appear. Click on the **Agreement Link** button to view the license agreement. After viewing the license agreement, navigate back to the License Agreement window and click Accept.



6. The Online Registration window will open. Enter information into the required fields and click OK.



7. A window will appear stating that the registration was successful. Click **OK**.

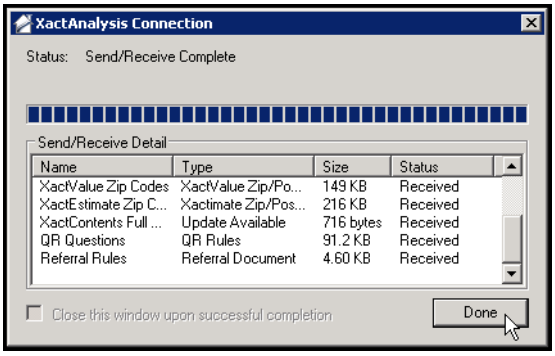


Note: *In the rare instance that you use an XactNet address that has already been created by a different user, you will need to register with a different address.*

8. In the XactAnalysis Communications area, the Register button now says Connect. Click the Connect button to connect to XactAnalysis.

This will allow XactAnalysis to communicate to your installation of Xactimate that there is an available XactScope license.

9. After the connection is finished processing, click **Done**. Any objects that were downloaded from XactAnalysis will process.

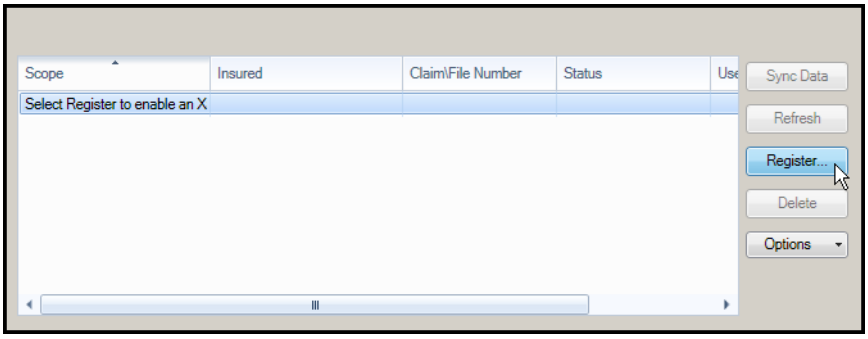


You are now ready to register XactScope with Xactimate.

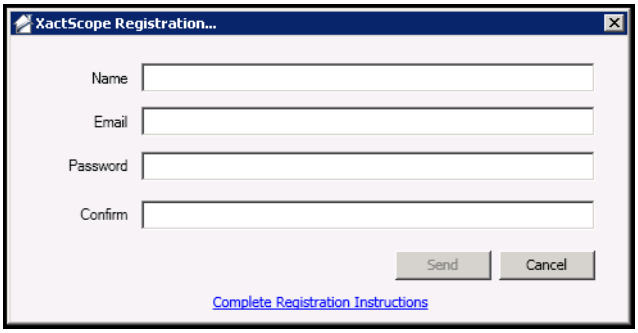
REGISTRATION FROM XACTIMATE

To register XactScope with Xactimate, you will first need to create a login in Xactimate. To do this,

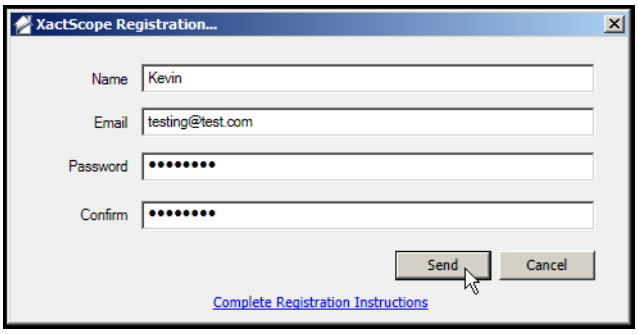
1. Open Xactimate and navigate to the **Projects** tab.
2. At the bottom of the screen is the XactScope pane. On the right side of the XactScope pane is a **Register** button. **Click** it.



3. The XactScope Registration window will appear.



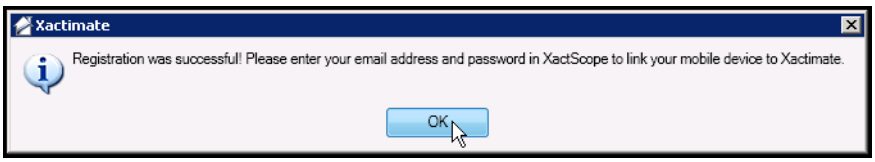
Enter in *Name*, *E-mail* and *Password.*



The **Send** button will now be enabled.

a. Select the **Send** button.

4. A window will pop up informing you that the registration was successful, and that you will need to use the same email address and password when logging in on your iDevice to link XactScope with Xactimate.

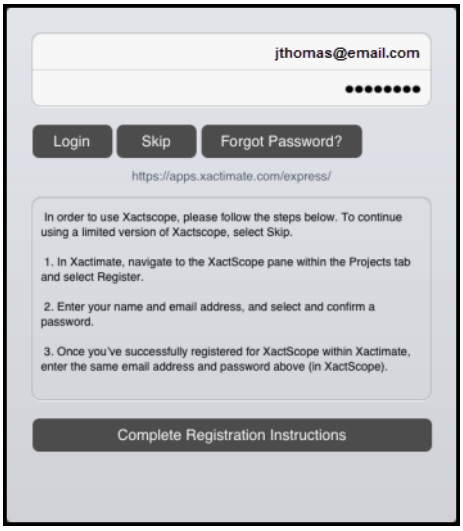


- If there are not available installs, a message will be sent back to **Xactimate** stating "*Registration could not be complete. All available XactScope licenses are in use. Contact your administrator or Xactware Sales*."

REGISTRATION FROM XACTSCOPE

To register XactScope with Xactimate,

1. On your mobile device, open the XactScope app.
2. A registration screen will appear where you can enter the email address and password that you used when registering in Xactimate. Enter the email address and password and tap **Login**.



Note: *If you have forgotten your password, tap* **Forgot Password?** *and you will receive an email with instruction on how to reset your password.*

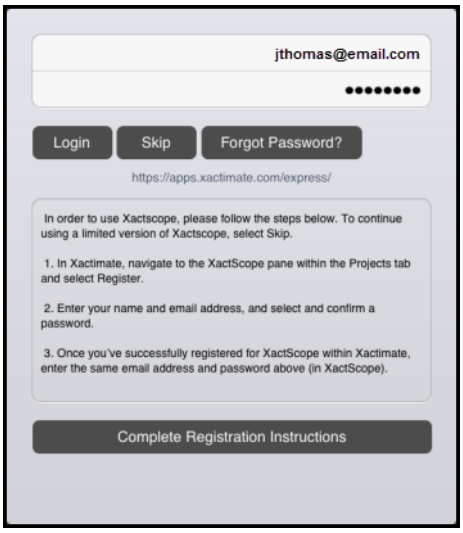
You have successfully registered XactScope with Xactimate. You can now start using XactScope with Xactimate to process and complete claims.

REGISTERING XACTSCOPE WITH XACTIMATE EXPRESS

In order to register XactScope with your Xactimate Express account, you willl need to make sure that the XactScope object is added to your instance of Express. Whoever manages your Express licenses will need to contact the Sales team at Xactware at **800-424-9228** to add the XactScope object.

Once the XactScope object has been added to your instance of Express,

1. Install XactScope 27.5 from the app store.
2. Open XactScope and use the same email and password you used for Express to login to XactScope.



You are now ready to use XactScope with Xactimate Express.

RE-REGISTERING XACTSCOPE AFTER RE-INSTALLING XACTIMATE

In the event that you need to re-install Xactimate, the following instructions explain how to re-register XactScope with Xactimate.

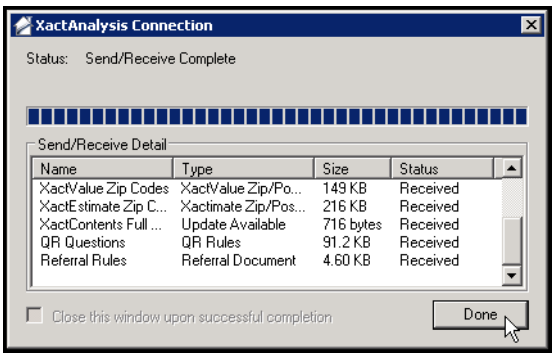
RECOVERING AN EXISTING XACTNET ADDRESS

1. After re-installing Xactimate, click on the Register button in the XactAnalysis Communications area.

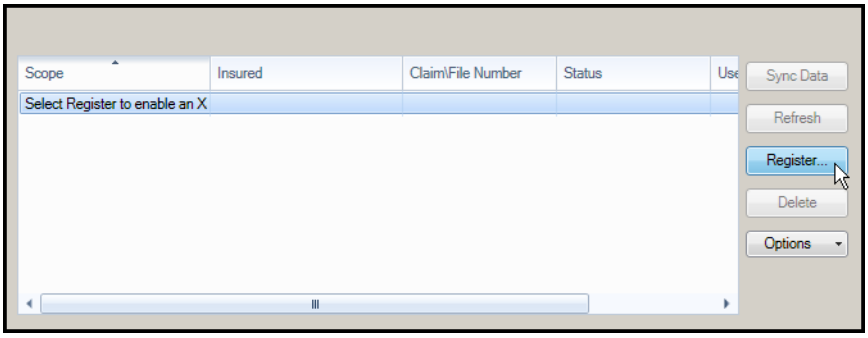
2. The Pre-Registration window will appear. To recover existing XactNet address, select the 'I already have an XactNet address and want to recover it' radio button. This will activate the Existing Registration Options section below, including the following radio buttons:
   a. **Support has already swapped my XactNet address** - Select this option in the event that you have already contacted support to enter your existing XactNet address. Click OK to register Xactimate.
   b. **Enter e-mail address associated with previous XactNet Address** - Select this option in the event that you used a valid email address to create your existing XactNet address. A field will appear below where you can enter the email address. An email will be sent to the corresponding email address with a security code. After receiving the security code, navigate back to the Pre-Registration window, where you will select the bottom radio button.
   c. **Enter previously sent security code to complete registration** - The E-mail field will be automatically populated with the email address you used, and a new Security Code field will appear below. Enter the security code received in the email, and click OK to register Xactimate.
3. After successfully recovering your existing XactNet address, navigate to the Control Center tab.
4. In the XactAnalysis Communications area, the Register button now says Connect. Click the Connect button to connect to XactAnalysis.

This will allow XactAnalysis to communicate to your installation of Xactimate that there is an available XactScope license.

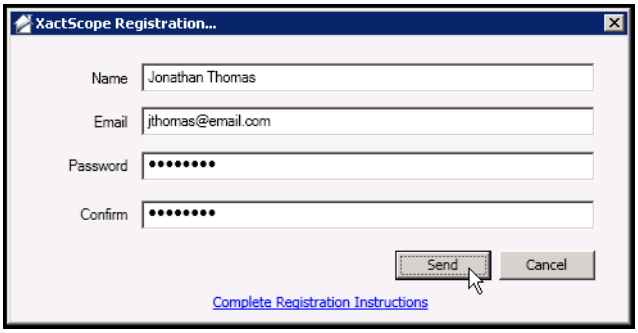
5. After the connection is finished processing, click Done. Any objects that were downloaded from XactAnalysis will process.



6. Navigate to the Projects tab and select **Register** in the XactScope pane.



7. In the XactScope Registration window, enter the same name, email address, and password that you used the first time you created an XactScope login. **Click Send**. If the XactNet address, email address and password all correspond to the original registration, the XactScope login and registration will be restored.



8. If you had already installed and registered XactScope before re-installing Xactimate, your installation of XactScope will automatically sync with your installation of Xactimate. If you hadn't, you can now install XactScope and register it with Xactimate.

Chapter 3
XactScope Version 27.5 Basics

INTRODUCTION

The following topics will give you some basic information about preparing you for using XactScope.

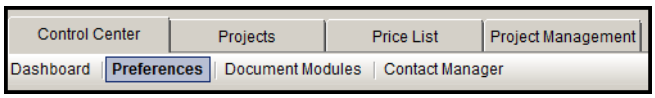
Note: *The screen shots were taken from an iPad, so there may be some variation with the images you see from your iPhone and what is displayed in this user guide. The same functionality exists for each device.*

XACTIMATE/XACTSCOPE SYNCHRONIZATION

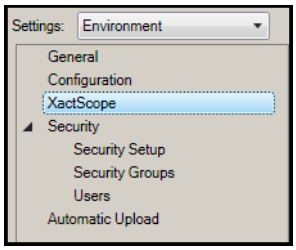
The Synchronization functionality allows the **XactScope** cloud to send and receive scopes to a mobile device. This synchronization can be triggered automatically when you log into **Xactimate** or you can trigger it manually. To setup the automatic functionality, follow the steps below:

PREFERENCES

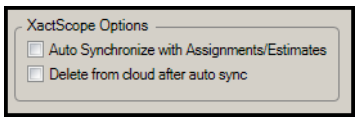
1. From ***Xactimate's*** Control Center, go to ***Preferences.***



2. Select the **XactScope** branch from the tree menu.



The following options will be available:



- **Auto Synchronize with Assignments/Estimates**: If this option is checked, when a scope is brought back to Xactimate from the device, if the scope originated from an existing project, the scope will be merged with the 'parent' project without action from the user.
- **Delete from cloud after auto sync**: If this option is checked, the file will be removed from the cloud when it has synced to Xactimate.

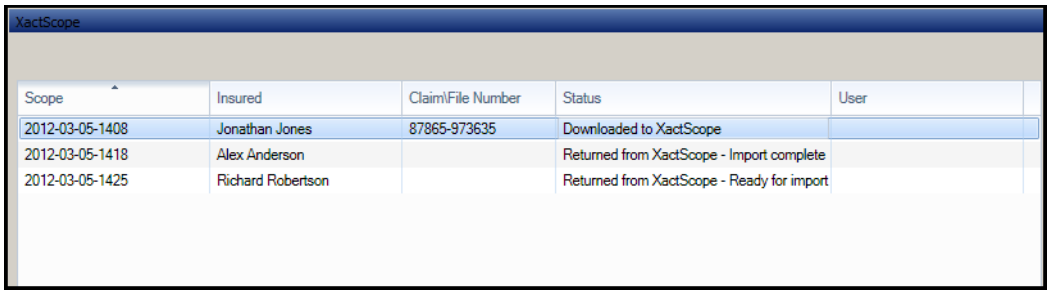
  Note: *This option may be necessary if there are a lot of files that are passed to-from the device and space is an issue.*

XACTSCOPE PANE

The XactScope Pane is located in the **Projects** tab in Xactimate. You will be able to see the following:

- Scope - displays the project/scope name.
- Insured.
- Claim\File Number.
- Status - displays the status of the scope which includes:
  - Sent - Available for download to XactScope.
  - Downloaded to XactScope.
  - Returned from XactScope - Ready for import.

– Returned from XactScope - Import complete.



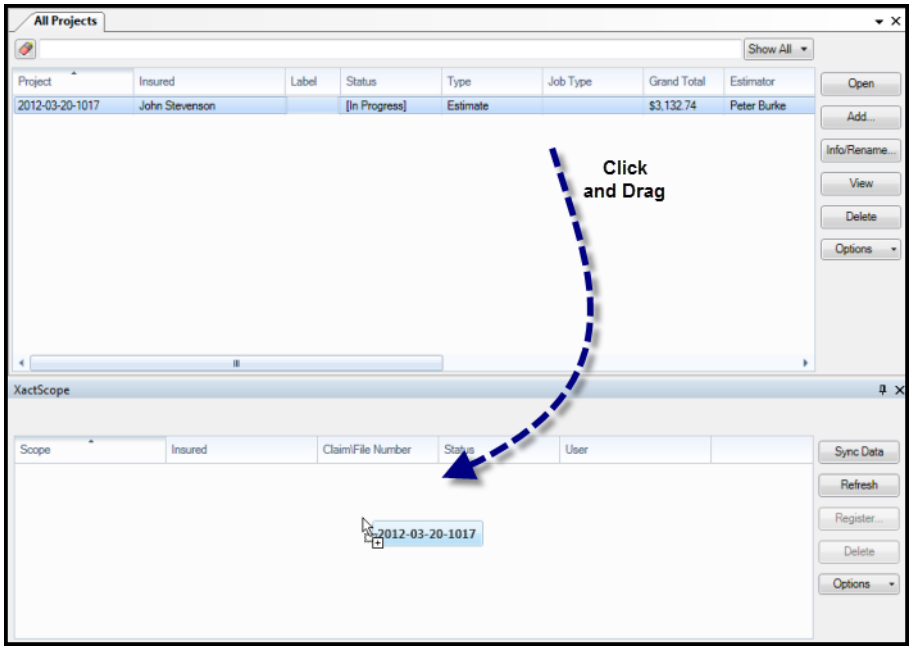
XactScope User Management

To manage your XactScope licenses, you will need to contact Xactware's Support Team at **1-800-710-9228**.

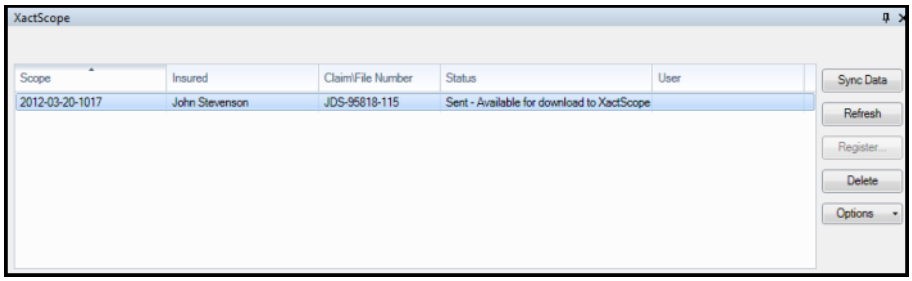
Transferring Estimates to XactScope from Xactimate

Estimates can originate in Xactimate and be sent to XactScope to be worked on once you are onsite. To transfer an estimate to XactScope,

1. **Create** an estimate in Xactimate.
2. **Save and Exit** out of the estimate.
3. **Navigate** to the Projects tab. Here you will find a list of projects.
4. **Click** on the estimate you want to send to XactScope and **drag** it down to the XactScope pane.



5. The estimate is now available to download on your iDevice.



USING XACTSCOPE

XactScope is Xactware's mobile estimation solution for professionals involved in all phases of building and repair. XactScope allows users to scope an estimate onsite, including adding a Sketch and printing reports. This section will cover how to use XactScope to create an estimate.

HOME PAGE

After installing XactScope on your iDevice and registering it with Xactimate, when you open XactScope you will see the Home Screen.

At the bottom of the screen are three buttons:

- **Project List** - Shows a list of estimates that are downloaded onto your device and are ready to be opened and worked on.
  - * *A red dot indicates a new, unopened estimate.*
- **Available Projects** - Shows a list of projects that are available to be downloaded onto your device.
- **Price Lists** - Shows a list of Xactware price lists that have been downloaded onto your device. Also allows you to download more price lists.

XACTSCOPE PRICE LIST USAGE

Users can download any Xactware price lists onto their mobile device. To do this,

1. Select the **Price Lists** icon from the Home page in XactScope.

2. Select the '**+**' sign in the top right corner of the Price Lists window.

   The **Request Price List** window will appear.

3. Enter the **Postal Code** for the area of the desired price list and select **Done**. The price list is downloaded onto the device.

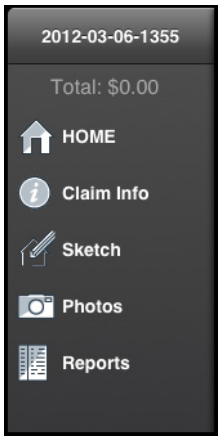
CREATING A NEW ESTIMATE

To create a new estimate,

1. Select the '**+**' sign at the top right hand corner of the screen.

Note: *If you have multiple profiles installed, a menu will appear where you can specify the profile for the new estimate.*

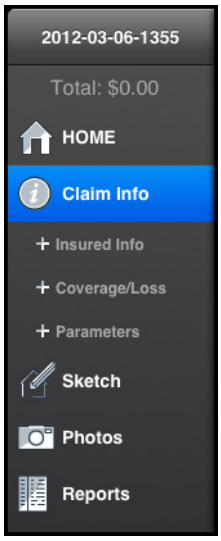
A new estimate number is created in the top left corner, and a navigation menu appears on the left side of the screen.



Note: *Selecting the* ***Home*** *option will take you back to the Projects List*

CLAIM INFO

1. Next, select the **Claim Info** option from the Navigation Menu. Three new sections will appear beneath Claim Info: Insured Info, Coverage/Loss, and Parameters.

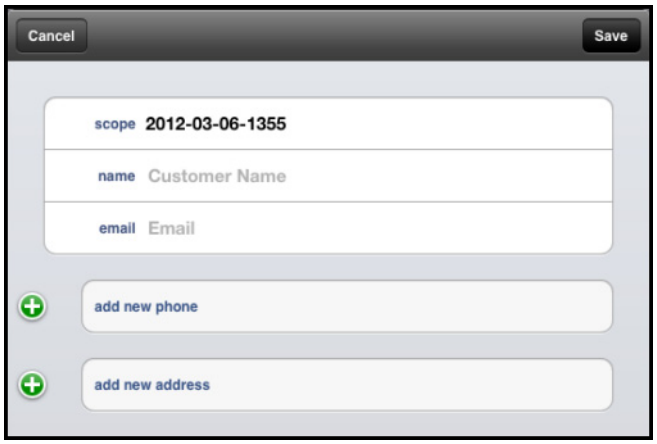


INSURED INFO

2. Select **Insured Info**. Four new sections will appear beneath Insured Info: *Info*, *Dates*, *Personnel*, and *Notes*.

3. Select **Info**. In the main body of the screen the estimate number will be displayed. Select the **Edit** button in the top right corner.

4. A new window will appear where you can enter the name, e-mail, phone number, and address of the insured.



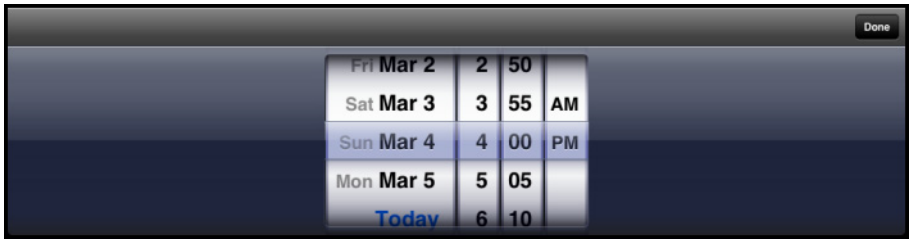
5. Enter the name and e-mail of the insured by selecting the fields and using the keyboard on the device. Enter a phone number and address by selecting the green plus signs next to each field.

Note: *Multiple phone numbers and addresses can be entered.*

6. When you are done entering this information, select the **Save** button in the top right of the window.

7. Next, select the **Dates** option from the Navigation Menu. Here you can enter the following Dates: *of Loss*, *Entered*, *Received*, *Contacted*, and *Inspected*.

8. To enter a date, select a field and a scroll wheel will appear at the bottom of the screen where you can specify a date and time. Do this for each date you wish to enter.



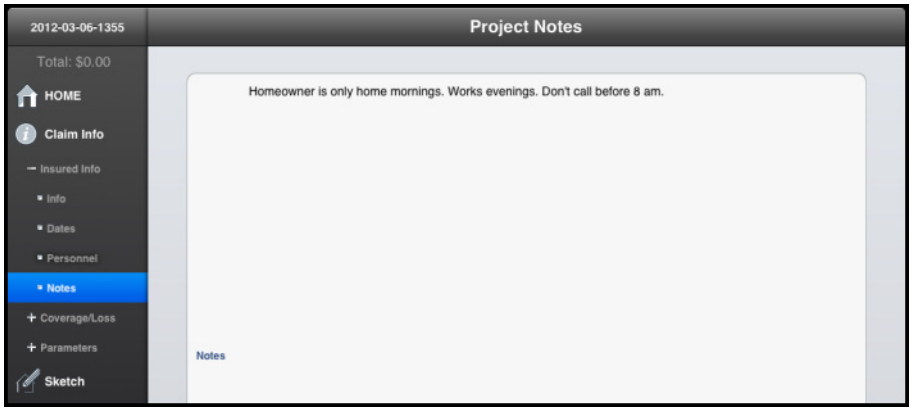
Note: *By default, Date Entered* will be whatever the date and time was when the estimate was created.

9. Select **Personnel** from the Navigation Menu. Here you can list various contacts related to this estimate, including Claim Rep, Reference, Estimator, Contractor, and Claimant.

10. Select one of the contacts. This will open a contact window where you can enter name, email, phone and address. The information is automatically saved when you navigate to a different tab.

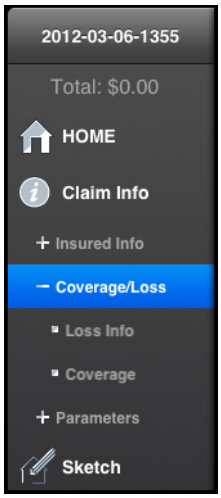
Note: *You can currently only add the name of the Claimant. You can add more Claimant information within Xactimate.*

11. After entering in contact information for the Personnel section, select **Notes**. This will open the Project Notes window. Here you can enter any desired notes about the estimate.

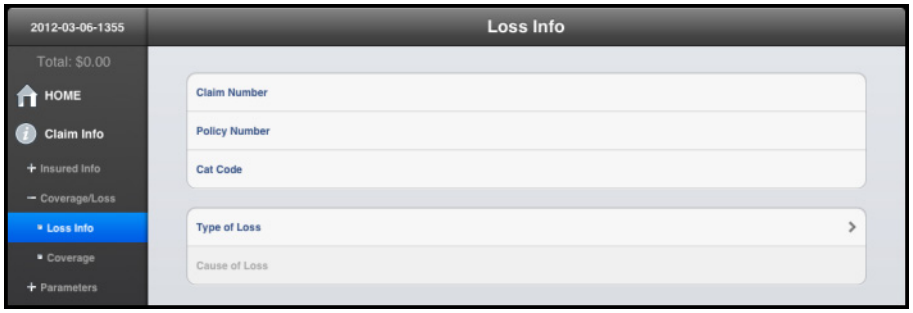


COVERAGE/LOSS

12. Next, select **Coverage/Loss** from the *Navigation Menu*. This will open two sections below the Coverage/Loss section: Loss Info and Coverage.



13. Select **Loss Info**. This will open the Loss Info window. Here you can enter the *Claim Number*, *Policy Number*, *CAT Code*, and *Type* and *Cause of Loss* using the device's keyboard.



Note: *Cause of Loss will become editable based on the Type of Loss.*

14. Next, select **Coverage** from the Navigation Menu. From the Coverage menu, you can determine coverages, deductibles, limits, and types.

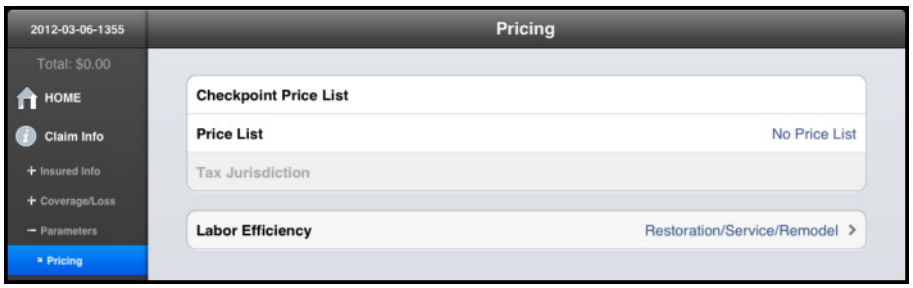
Select each section to specify coverages and limits.

Note: *To delete any of the coverage sections, swipe your finger to the right or left in the section, and a Delete button will appear.*

PARAMETERS

15. Next, select **Parameters** from the *Navigation Menu*. The new sections will appear below Parameters: *Pricing*, *Add Ons*, and *Report Text*.

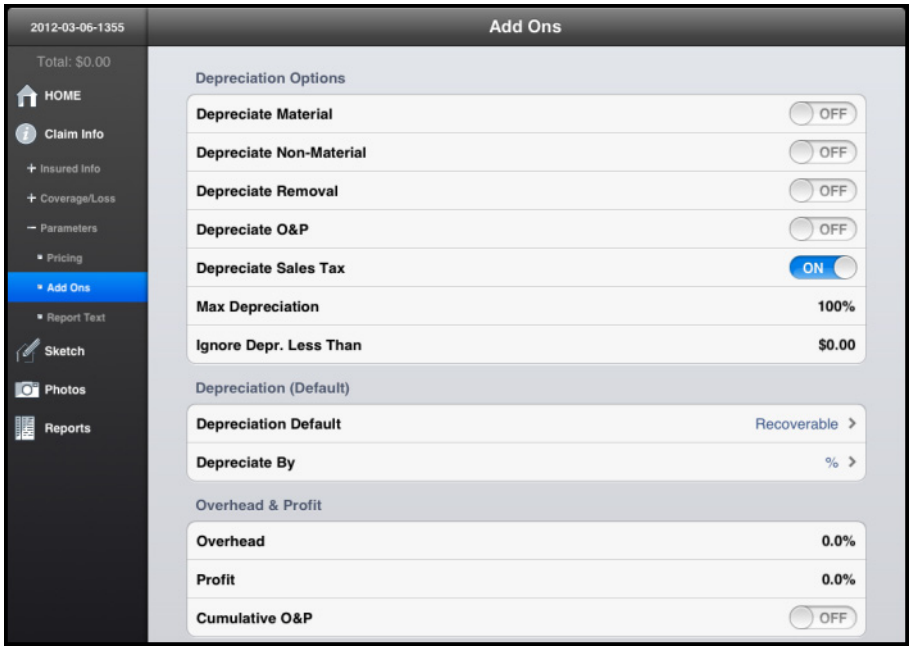
16. Select **Pricing**. The Pricing window will open. Here you can determine the estimate *Price List* and *Checkpoint Price List*, *Tax Jurisdiction*, and *Labor Efficiency*.



17. To add a price list, select the price list section. The **Select Price List** window will appear. Select the price list from the downloaded price lists.

Note: *If you have not yet downloaded the price list you want, tap the '**+**' sign in the top right corner, enter the postal code of the desired price list, and select **Done**. This will download the desired price list.*

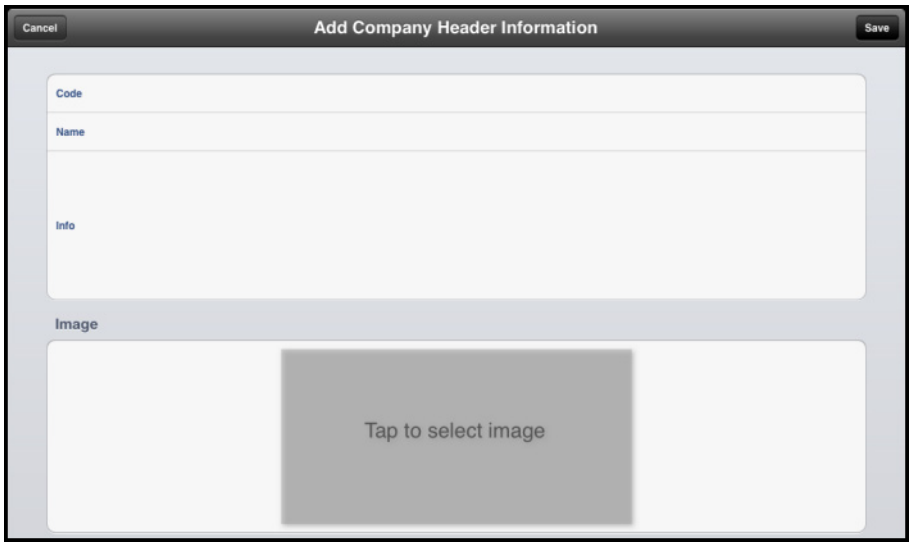
18. Next select **Add Ons**. Here you can determine depreciation options and overhead and profit.



19. Next select **Report Text.** Here you can add a company header and opening and closing statements.

20. To add a company header, tap the company header section. This will open the Company Header list.

21. Tap the '**+**' sign in the top right corner to add a company header. This will open the Add Company Header Information window.



22. You can enter information into the *Code*, *Name*, and *Info* fields, and you can add a company image from the device's photos.

23. Once you have entered all of the information, tap **Save** in the top right corner. This will take you back to the Company Header screen, where you will now see the code entered for the company header.

24. Tap the code to add the company header to the estimate.

Note: *You can create multiple company headers.*

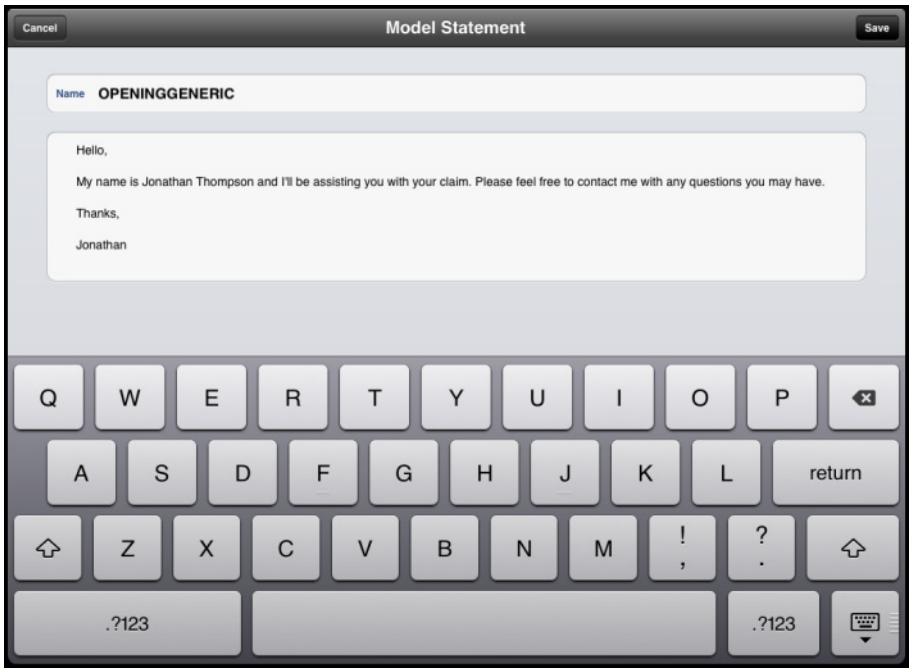
In the Report Text page, you can also add **opening and closing statements**. You can add a one-time statement by tapping in the main body of the Opening or Closing statement area and typing the statement, or you can create statement templates that can by used over and over again.

25. To create a template, tap on the blue arrow on the right side of the section.

This will open the Model Statements window.

26. Tap the '**+**' sign in the top right corner to create a new model statement.

27. Enter a Name for the model statement, and the enter text in the field below.



28. When you are finished, tap **Save**.

The model statement is now saved in the Model Statements window and can used in other estimates as well.

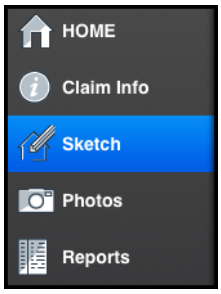
SKETCH

The Sketch functionality in XactScope closely matches what can be done in the desktop version of Xactimate. The following instructions will introduce you to Sketch on XactScope.

NAVIGATING IN SKETCH

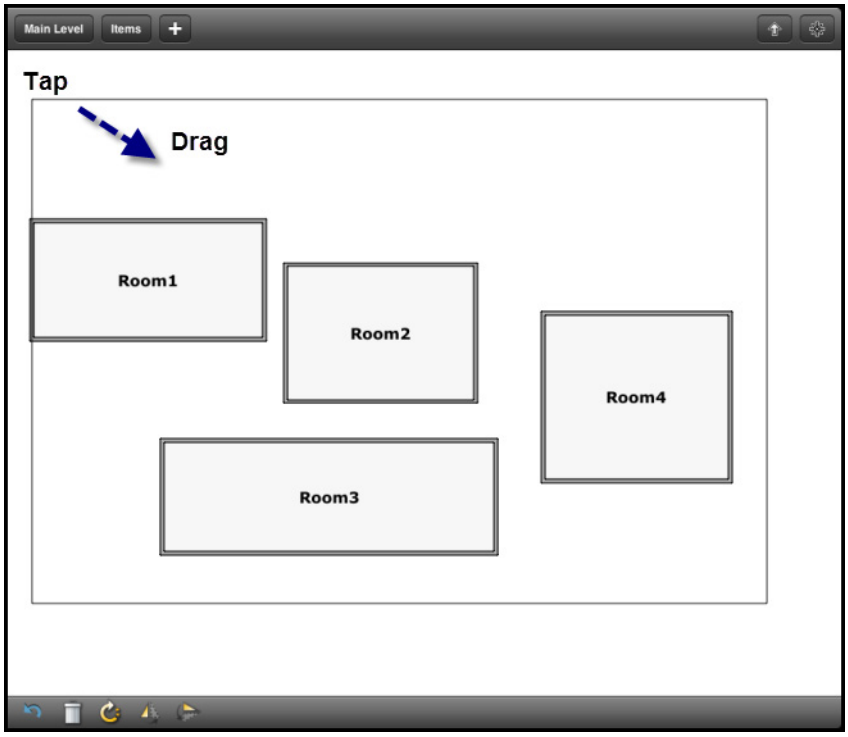
To use Sketch correctly, it is important to know how to navigate while using Sketch.

Select **Sketch** in the *Navigation Menu*.

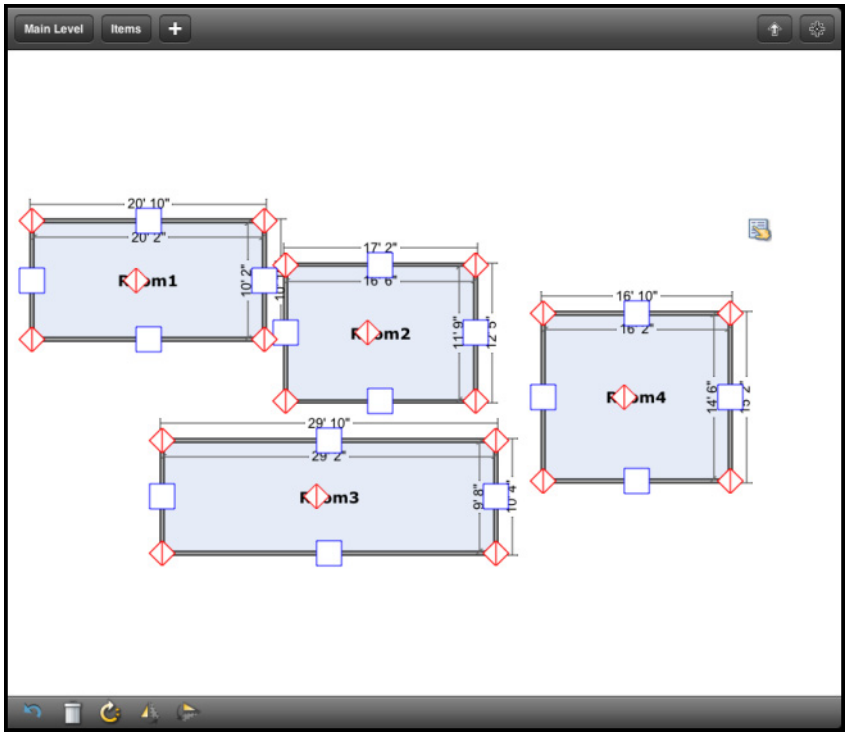


- **Panning** - To pan around the Sketch area, simultaneously place **two fingers** on the screen and move them around.
- **Zoom Out** - To zoom out, place two fingers on the screen a few inches apart, and **slowly bring them together**.
- **Zoom In** - To zoom in, place two fingers on the screen right next to each other and **slowly separate them**.

- **Select One or Multiple Items** - To select one item, you can just tap on it. To select multiple items, **press one finger on the screen and drag**. You will see a box forming.



Make sure the box either touches or surrounds the items you would like to select. Take your finger off the screen when you have surrounded the desired items. The surrounded items will be highlighted.



- **Toolbar** - At the bottom of the Sketch screen is the toolbar with five icons.

These tools are, from left to right:

  - **Undo** - **Undo** up to five of your most recent actions.
  - **Delete** - Highlight single or multiple items and then press the **Delete** icon to delete them.
  - **Rotate** - Highlight single or multiple items and press the **Rotate** icon to rotate them clockwise.
  - **Flip Horizontally** - Highlight single or multiple items and press the **Flip Horizontally** icon to flip the item(s) horizontally.
  - **Flip Vertically** - Highlight single or multiple items and press the **Flip Vertically** icon to flip the item(s) vertically.

- **Levels** - When you first open Sketch in a new estimate, by default there will be one level called Main Level. To add levels in Sketch, tap the level button, which will show the name of the level you are on currently. To start out, it will always show **Main Level** since that is that level you start on. It is located at the top of the Sketch screen.

This will open the **Levels** window. From this window you can **Add** new levels, **Delete** levels, and **Edit** existing levels.

  * *In the Levels window, there will be a check mark next to the level that you are on currently.*

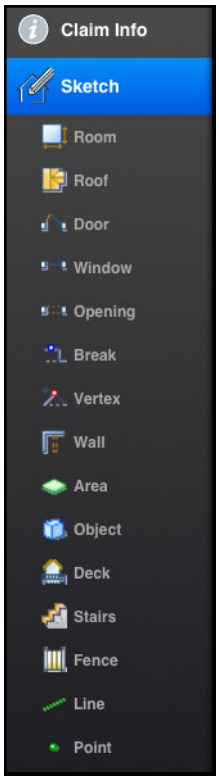
  - **Add a level** - Tap the '**+**' sign in the bottom right corner. **Add Above** and **Add Below** buttons will appear. Add Above will add the new level above the existing level. Add Below will place it below. Select one and the **Add Level** window will appear. Enter a **Level Name** and **Level Code** will be entered automatically. Tap **Save**. The new level is created.
  - **Delete a level** - To delete a level, tap the level button, which will show the name of the level you are on currently. The Levels window will appear. Tap the **Edit** button in the top right corner. **Red minus signs** will appear next to each level. Tap the minus sign next to each level you want to delete. When you are done, tap **Done**.
  - **Edit a level** - To edit a level, tap the Level button. The Levels window will appear. Tap the **Edit** button next to the level you want to edit. This will open a window for that level where changes can be made.

ROOM

Adding a room is one of the most basic functions in Sketch. To begin,

1. Select the **Sketch** button in the *Navigation Menu*.

2. Several options will open underneath Sketch. Select **Room**.



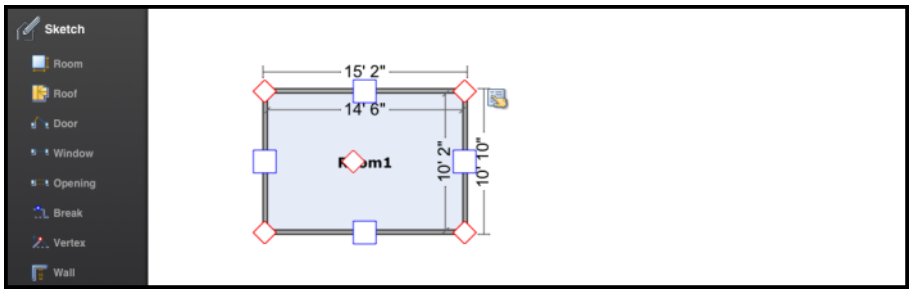
3. There are two ways to add a room:

a. Tap the screen once with your finger to create a standard 12’ by 12’ room, or

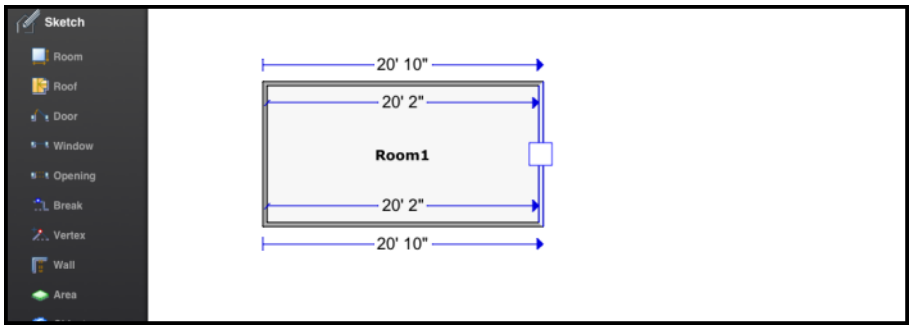
b. Press down on the screen with one finger and drag it until you’ve created a room with the desired dimensions.

Note: *You will need to select* ***Room*** *from the Navigation Menu each time you want to add a new room.*

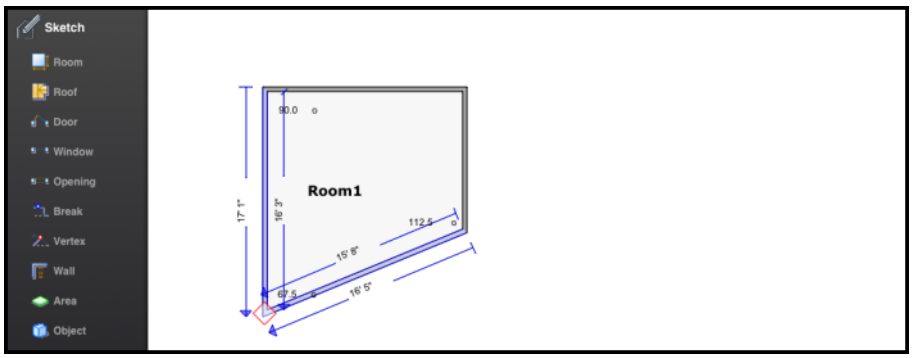
4. To adjust the size of a room, tap somewhere within the room to highlight it. This will turn the room a light shade of blue, and blue boxes will appear in the middle of each of the room’s walls, with red diamonds in each corner.



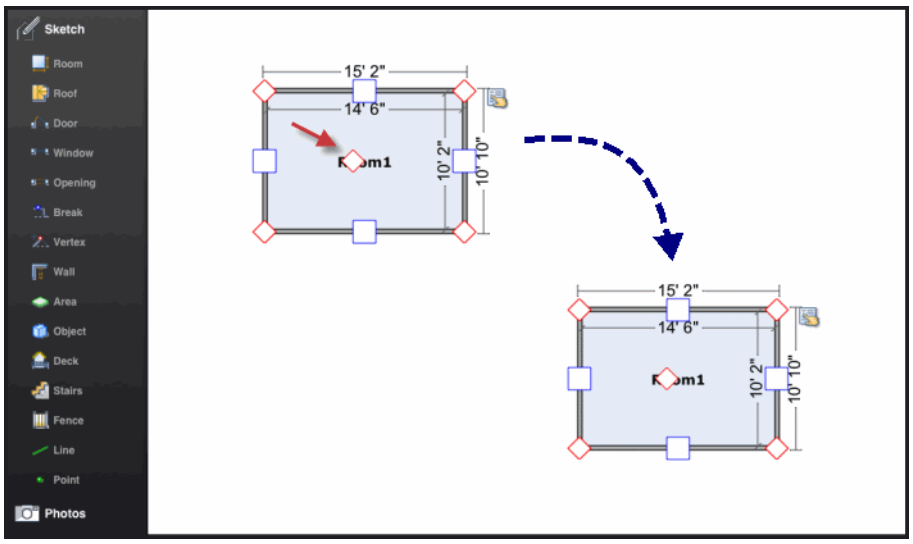
5. Press down on one of the blue boxes and drag your finger to adjust the room size.



6. Press down on one of the red diamonds and drag your finger to adjust the angle of the walls.



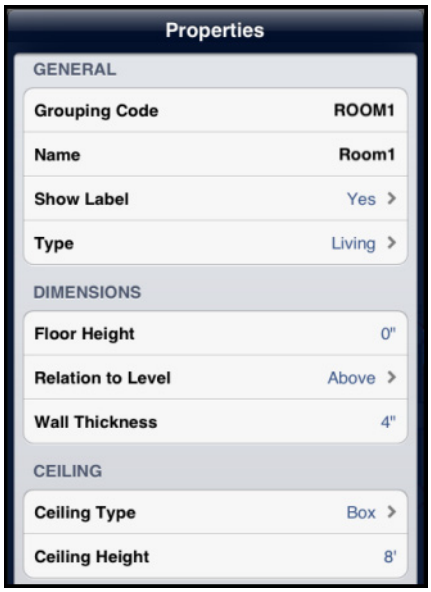
7. To move the room, press down on the red diamond in the middle of the room and drag the room to the desired location.



8. To access the room properties, tap on the room. The properties icon will appear at the top right corner of the room.

9. Select the **Properties** icon. This will open the Properties window.

10. In the Properties window you can:
    a. Change the Grouping Code and Name of the room.
    b. Change the Show Label option.
    c. Change the type of the room.
    d. Adjust the dimensions of the room.
    e. Determine the relation of the room to the level it is on.
    f. Adjust wall thickness.
    g. Change the ceiling type and height.

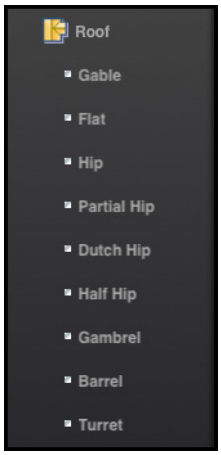


h. View the room's variables.

ROOF

Adding a roof is similar to adding a room.

1. Select **Roof** from the *Navigation Menu*. This will open several new options below Roof. These options are the different available roof types you can add in Sketch.



2. Select one of the roof types.

3. There are two ways to add a roof:

a. Tap the screen once with your finger to create a 12' by 12' roof, or

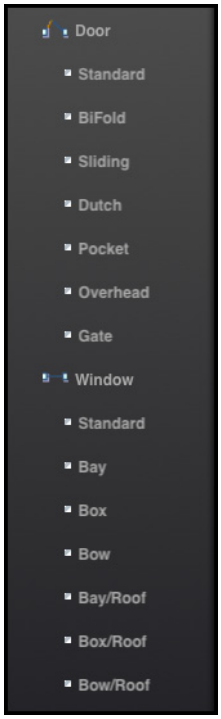
b. Press down on the screen with one finger and drag it until you've created a roof with the desired dimensions.

Note: *You will need to select **Roof** from the Navigation Menu each time you want to add a new roof. Roofs can be adjusted and moved in the same manner as rooms, and you can access roof properties in the same way you can access room properties.*

Door and Window

Doors and windows can be added to walls of rooms. Adding doors and windows is similar to adding rooms and roofs.

1. Select the **Door** or **Window** options from the *Navigation Menu*. Several options will open below Door and Window.



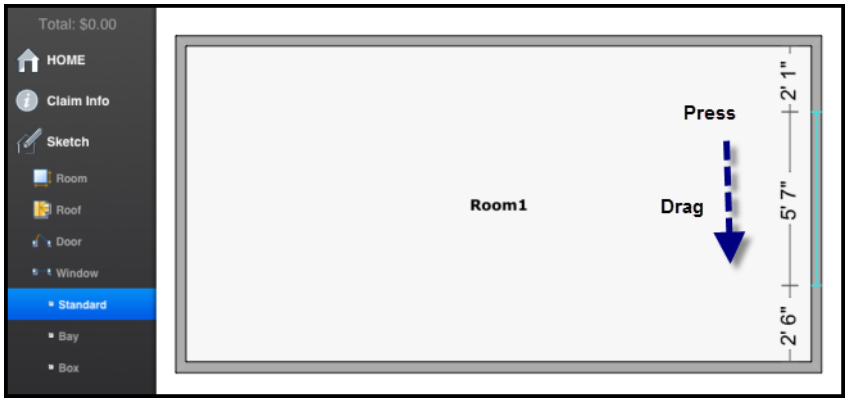
2. Select a type of door or window from the *Navigation Menu*.

3. There are two ways to add a door or window:

Note: *It is easier to add doors and windows if you are zoomed in on the room to which you are adding these objects.*

a. With your finger, tap once on the area of the wall where you want to place a pre-measured door or window, or

b. Press down on the wall with your finger and drag along the wall until the door or window is the desired size.

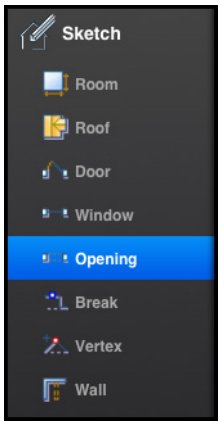


Note: *You will need to select a door or window from the Navigation Menu each time you want to add a new door or window. Doors and windows can be adjusted and moved in the same manner as rooms and roofs, and you can access door and window properties in the same way you can access room and roof properties.*

OPENING

To add a wall opening,

1. Select **Opening** from the *Navigation Menu*.



2. There are two ways to add an opening to a wall:

a. Tap the wall where you want to create an opening. **This will delete the entire wall**. Or,

b. Press your finger down and drag across the perimeter of the wall where you want to create an opening.

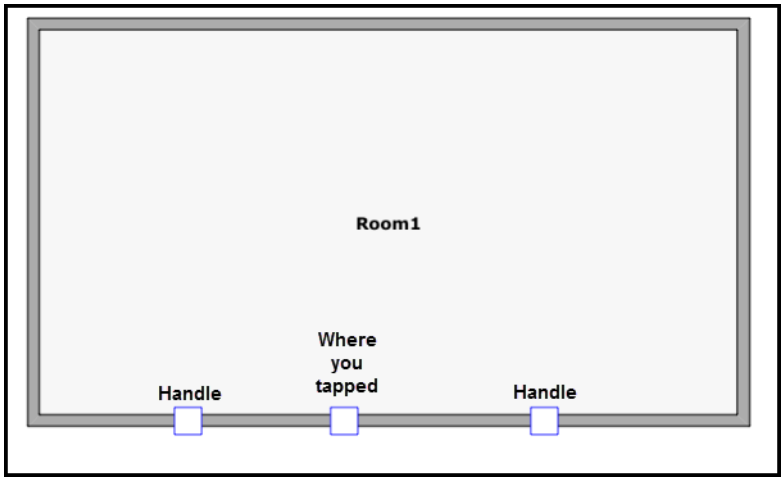
Note: *You will need to select Opening from the Navigation Menu each time you want to add a new opening. Openings can be adjusted and moved in the same manner as rooms and roofs, and you can access opening properties in the same way you can access room and roof properties.*

BREAK

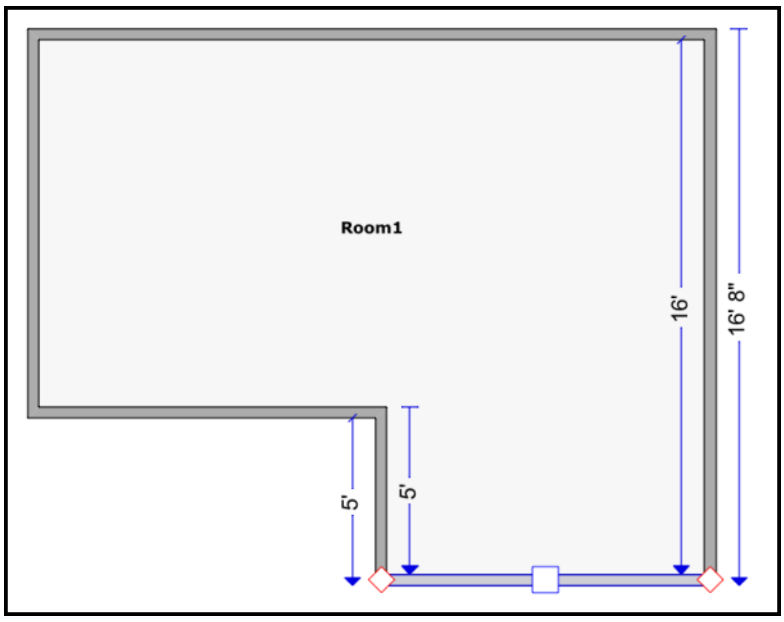
The Break tool allows you to move a portion of a wall to create an offset. To do this,

1. Select Break from the *Navigation Menu*.

2. Tap on the wall where you want to create the offset. Three blue boxes will appear on the wall: one where you tapped and two more that are handles.



3. Press on one of the handles and drag to create the offset. Drag the offset out to the desired dimensions.



A scrolling list will be displayed. The left roller list displays the measurements in feet. The right roller will display measurements in inches.

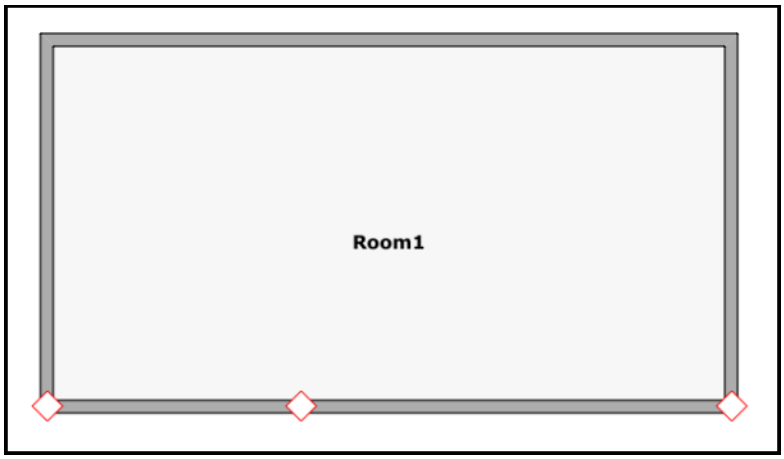
Note: *You will need to select Break from the Navigation Menu each time you want to create a new offset.*

VERTEX

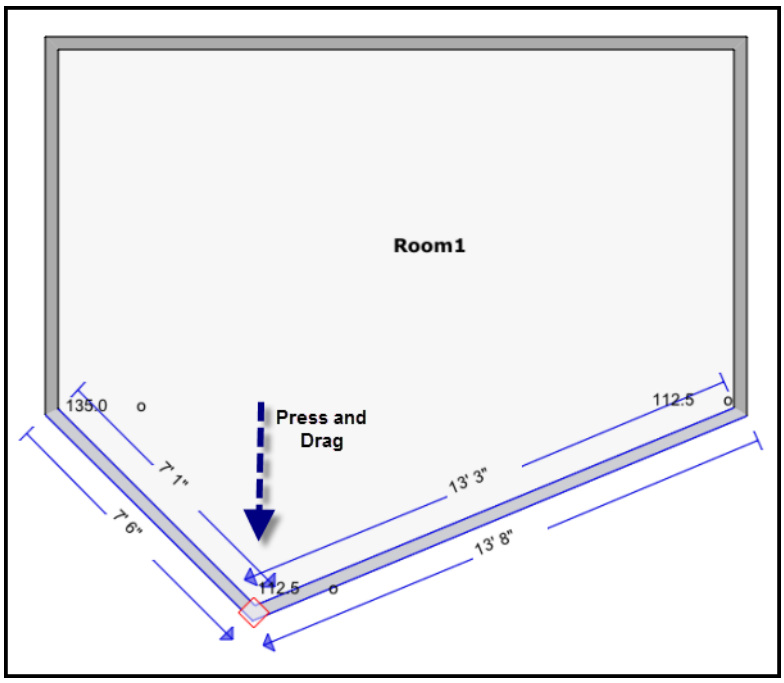
The Vertex tool allows you to create a hinge point in the wall. To do this,

1. Select **Vertex** from the *Navigation Menu*.

2. Tap on the wall where you want to create the vertex. A red diamond will appear where you tapped.



3. Press the red diamond and drag to create the vertex point.



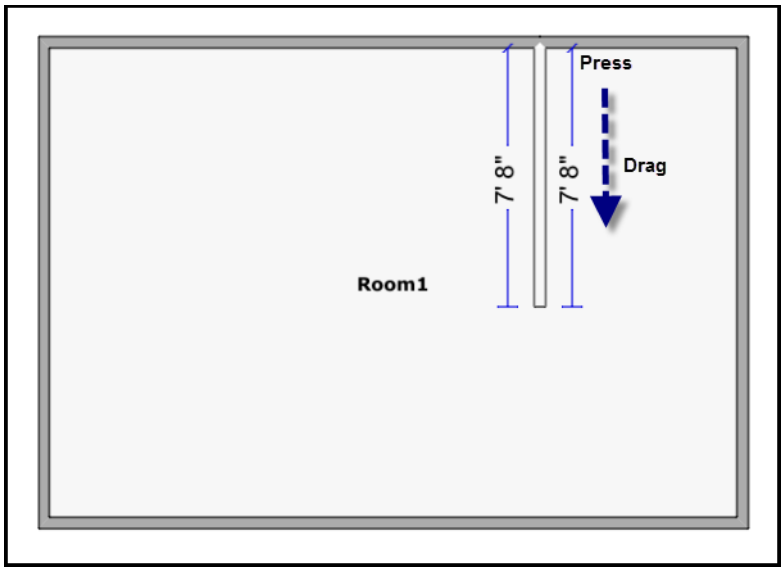
Note: *You will need to select Vertex from the Navigation Menu each time you want to add a new vertex.*

WALL

Walls can be added much like windows and openings.

1. Select **Wall** from the *Navigation Menu*.

2. To add the wall to your sketch, **press** your finger on the screen and **drag** where you want to add the wall.



3. To make changes to the wall, tap the wall. A blue box will appear in the middle of the wall with red diamonds on each end.

4. To move the wall, press the blue box and drag the wall to where you want it.

5. To change the length of the wall, press one of the red diamonds on either end drag it until it is the desired length.

Note: *Walls can be adjusted in the same manner as rooms and roofs, and you can access wall properties in the same way you can access room and roof properties.*

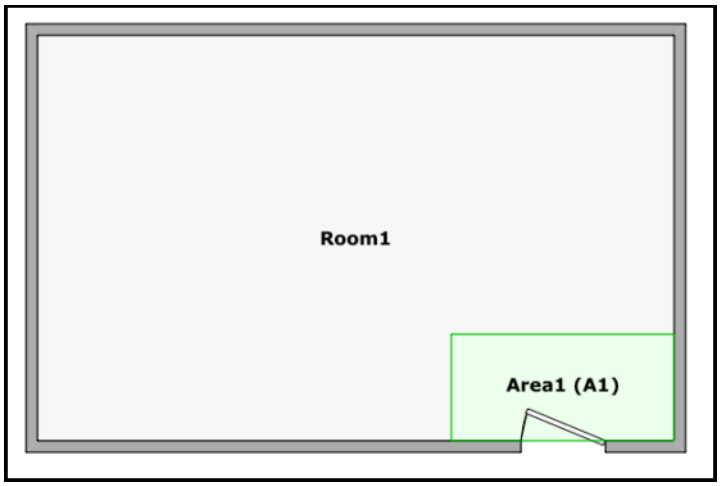
AREA

The Area tool allows you to create a discrete, editable area you define that gives you additional flexibility in dimensioning. For example, you may have a carpeted room with an entry area of ceramic tile. You can create a reference area to reflect the dimensions of the tiled portion, and another for the carpeted area. To add an area,

1. Select **Area** from the *Navigation Menu*.

2. There are two way to add an Area.
   a. Tap inside a room to fill the entire room with the area, or
   b. Press down with your finger and drag the area out until it has the desired dimension.

3. Once an area is created, it can be moved and adjusted just like a room is.



Note: *You will need to select Area from the Navigation Menu each time you want to add a new area. Areas can be adjusted and moved in the same manner as rooms and roofs, and you can access area properties in the same way you can access room and roof properties.*

OBJECT

The Object tool allows you to create a discrete, editable area which has volume (such as a concrete slab. Blocks can be drawn similar to Areas, and can be drawn anywhere on the Sketch workspace. For example, you may have a 4" thick concrete patio slab measuring 12' x 10' outsides the dining room door, exterior to the building. As you create the slab in Sketch, the cubic yards of concrete are automatically calculated based on the room's variables. To add an object,

1. Select **Object** from the *Navigation Menu*.
2. To add the object, place your finger on the screen and drag until the object has its desired dimensions.

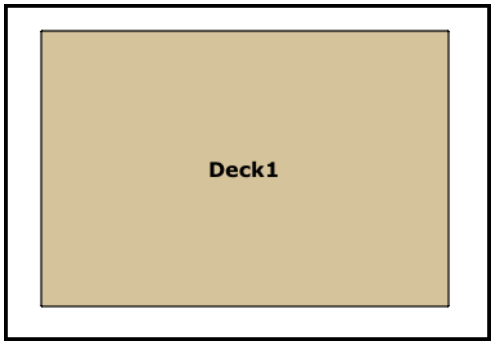
Note: *You will need to select Object from the Navigation Menu each time you want to add a new object. Objects can be adjusted and moved in the same manner as rooms and roofs, and you can access object properties in the same way you can access room and roof properties.*

DECK

Decks are added and adjusted in the same way as rooms.

1. Select **Deck** from the *Navigation Menu*.
2. There are two ways to add a deck:
   a. Tap the screen once with your finger to create a standard 10' by 10' deck, or

b. Press down on the screen with one finger and drag it until you've created a deck with the desired dimensions.



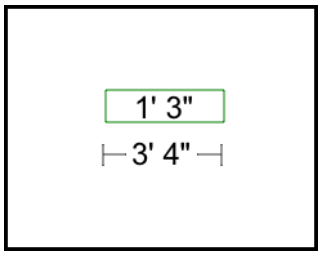
Note: *You will need to select Deck from the Navigation Menu each time you want to add a new deck. Decks can be adjusted and moved in the same manner as rooms and roofs, and you can access deck properties in the same way you can access room and roof properties.*

STAIRS

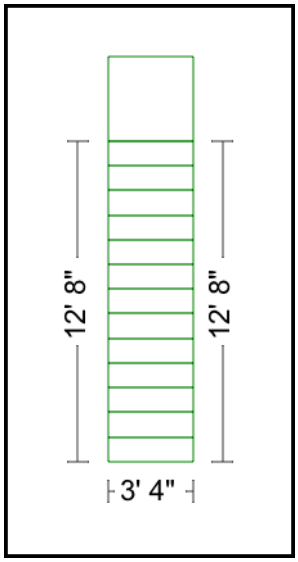
To add stairs,

1. Select **Stairs** from the *Navigation Menu*.

2. Press one finger on the screen and start to move your finger. A green rectangle will appear in the Sketch workspace.



3. Release your finger from the screen, press down on the rectangle and drag your finger in the direction you want to create the stairs. Stairs are created as you drag your finger.

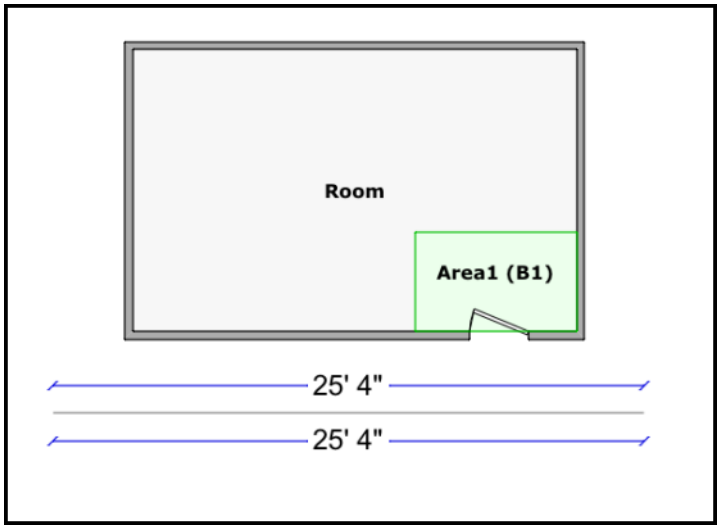


Note: *You will need to select Stairs from the Navigation Menu each time you want to add new stairs. Stairs can be adjusted and moved in the same manner as rooms and roofs, and you can access stairs properties in the same way you can access room and roof properties.*

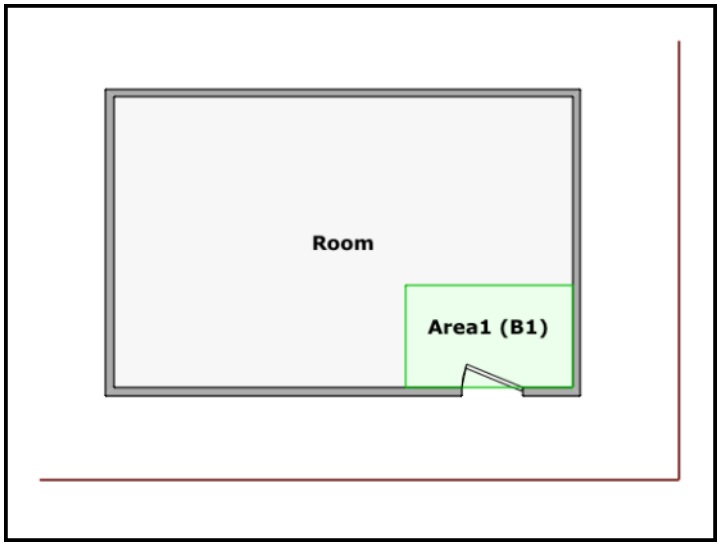
FENCE

To add a fence,

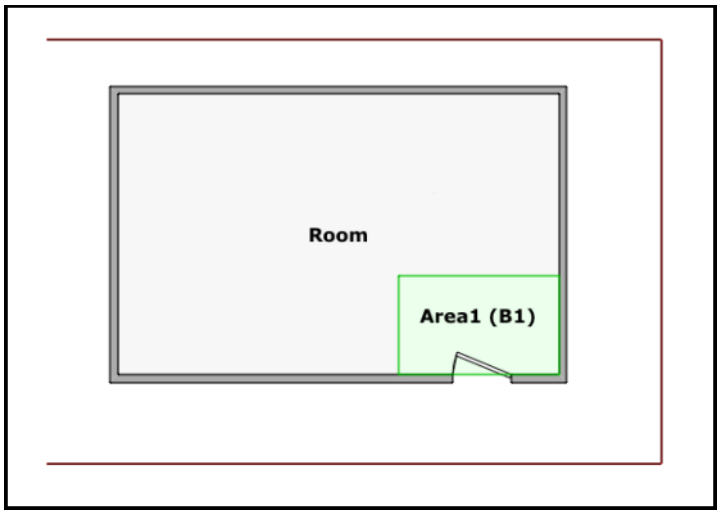
1. Select **Fence** from the *Navigation Menu*.
2. Press and drag until the first side is the desired length.

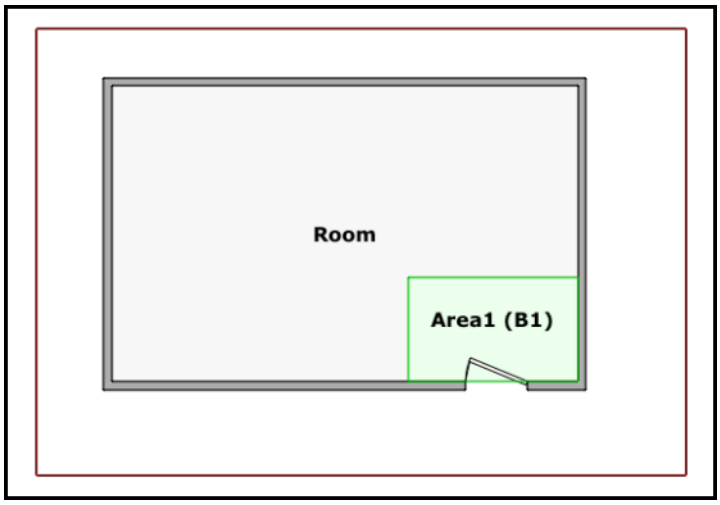


3. Take your finger off the screen, press down again and drag you finger in the direction you want the next side of the fence to go.



4. Continue until you have completed the fence.





Note: *Fences can be adjusted and moved in the same manner as doors and windows, and you can access fence properties in the same way you can access door and window properties.*

LINE

The Line tool allows you to draw a line in Sketch to call attention to a specific line, plane, or conduit. To place a line,

1. Select **Line** from the *Navigation Menu*.
2. Press and drag on the screen where you want to add a line.

   A green line will appear.
3. To change a line's properties, tap on it to activate the Properties icon, then press on the icon.

Point
The Point tool allows you to place a reference point on the Sketch workspace to call attention to a specific point. To place a point,

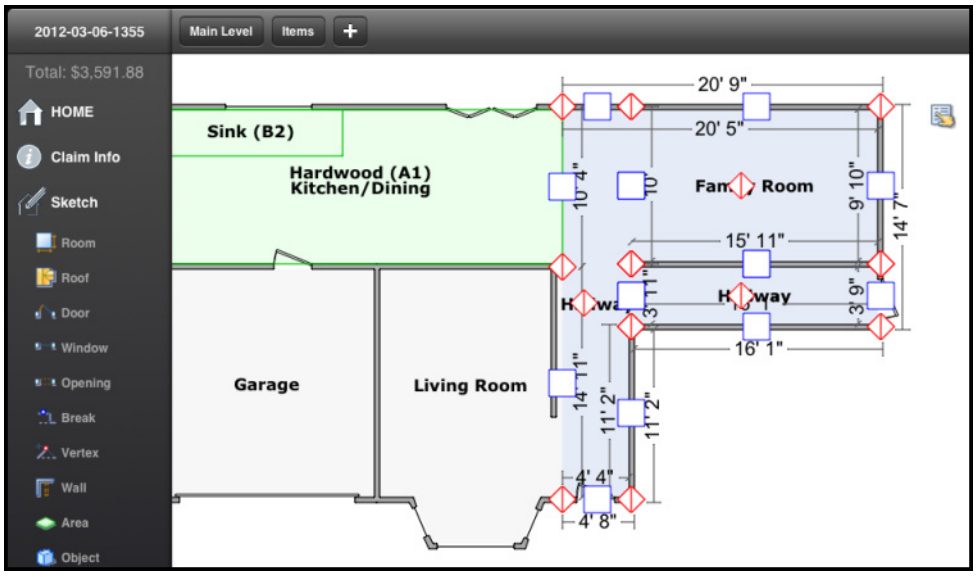
1. Select **Point** from the *Navigation Menu*.
2. Tap on the Sketch workspace where you want to place the point. A red diamond will appear.
3. When you tap somewhere else in Sketch, the red diamond will go away and the point will be represented as a green dot.
4. To change the point's properties, tap on it to activate the Properties icon. In the point properties, you can change the name of the point and adjust the distance from the floor. The point will be visible in 3-D mode when the estimate is transferred in Xactimate.

Line Items
There are multiple ways to search for and add line items in XactScope. They include:

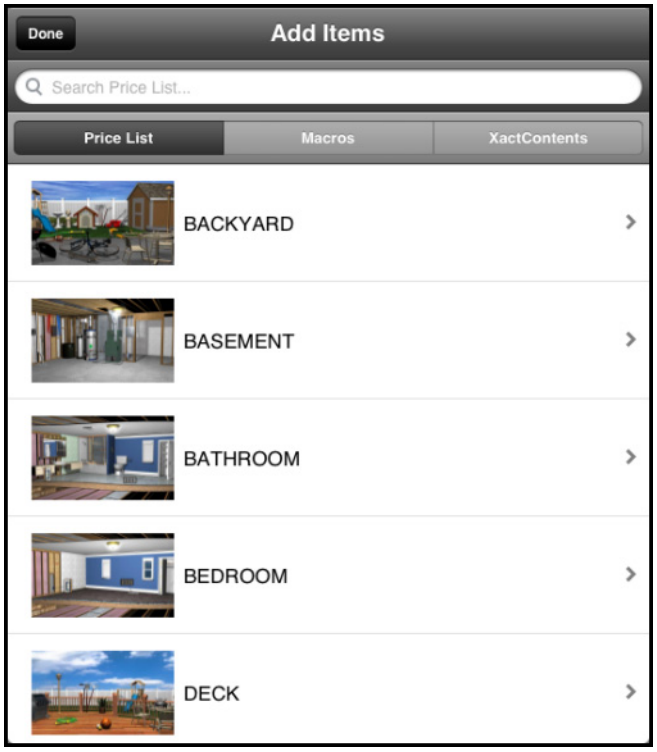
- Search Price Lists - Search keywords and category and selector codes to find items.
- Search Macros - Search for Macro names.
- Search XactContents - Search Xactware's XactContents database.
- Reference Search - Using images of several typical room types (e.g., bedroom, bathroom, kitchen) and structural diagrams (e.g., plumbing, flooring, framing), Reference Search allows you to select a part of a room and select from several items associated with that area of the room.

Price List Search
To add line items by using the Price List search,

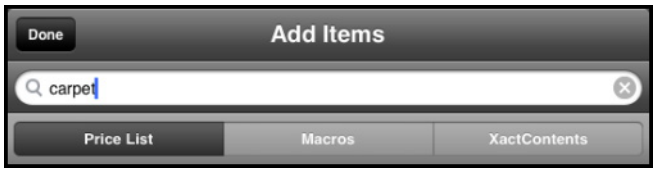
1. Highlight the room(s) to which you want to add line items.



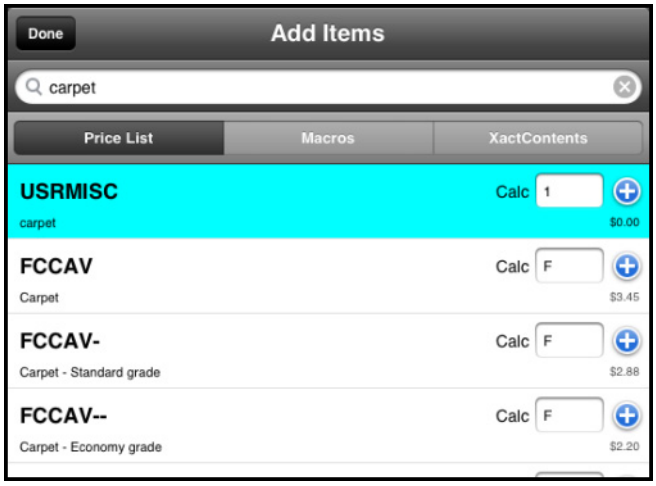
2. After highlighting the desired rooms, tap the '**+**' sign at the top of the Sketch screen. This will open the Add Items screen.



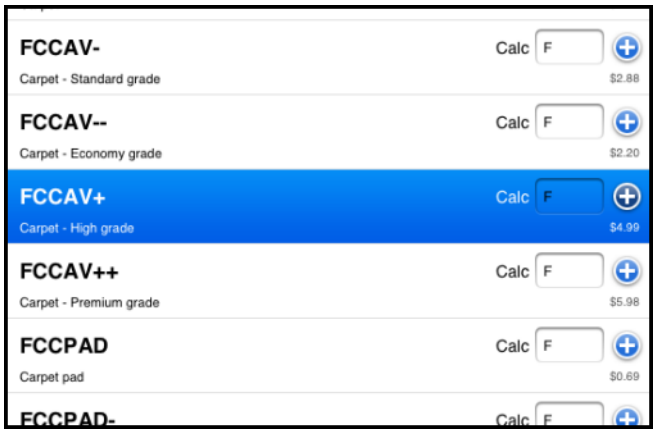
3. In the search bar near the top it will say Search Price List. Enter a keyword or, if you know the category and/or selector codes, you can search those.



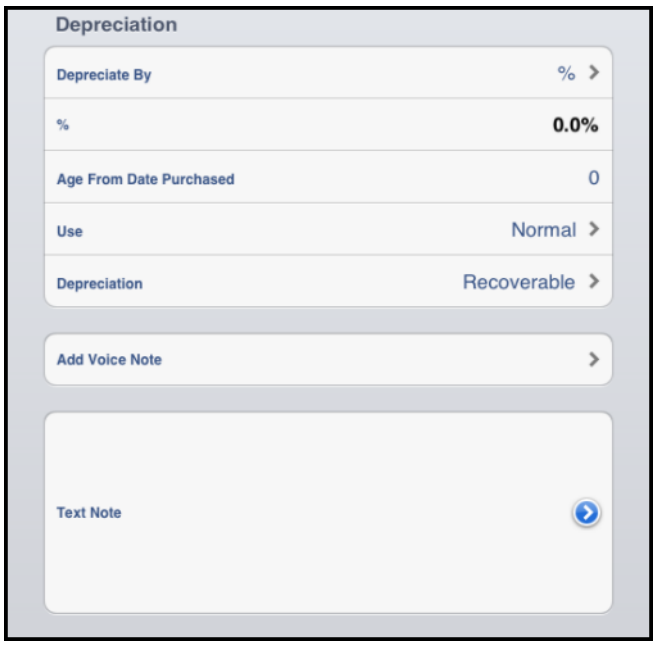
4. The search results will appear in the area below the search bar. Scroll down to find the item(s) you are looking for.



5. When you find the item, tap it to add it to the highlighted rooms.



The item screen will open. Here you can make changes to the Calculation variable, Activity, price, Coverage, and Depreciation. You can also add Voice and Text notes.



6. Make any desired changes and tap **Save**.

   This will take you back to your search results. You can search for additional items.

7. When you are finished, tap **Done**.

   The item(s) has been added to the highlighted room(s).

Note: *To view what items have been added to specific rooms, highlight the rooms and tap the Items button at the top of the Sketch page. This will open the Items window. All items added to the highlighted rooms will be displayed underneath their respective rooms.*

If you add items without first specifying rooms, the items will be added to the entire level.

MACROS

Macros are saved lists of line items you can add to a room. For example, if you enter a list of line items into a room, then realize that the room reflects a standard scope that you commonly see (such as water damage or a kitchen fire) you can mark some or all of the items in a room to create a macro.

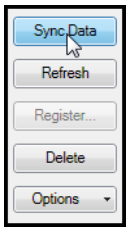
Macros must be created in Xactimate. They can then be synced to XactScope.

To learn how to create a macro in Xactimate, search for Macros in Real Time Training in Xactimate.

To sync macros with XactScope,

1. After creating a macro in Xactimate, navigate to the XactScope section in the Projects tab.

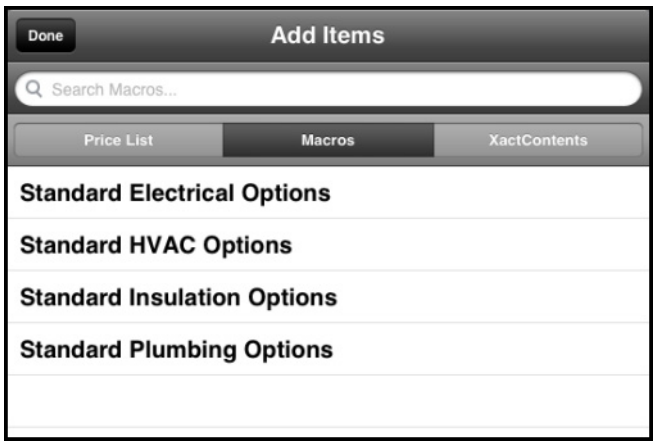
2. Click on Sync Data in the right corner. Any new macros will be synced with XactScope.



Note: *You will need to register XactScope with Xactimate before you can sync data between each program.*

To add a macro to a room in XactScope,

1. In Sketch from XactScope, highlight the room(s) to which you want to add a macro.
2. Tap the '**+**' sign at the top of the *Sketch* screen. This will open the **Add Items** window.
3. Tap the **Macros** button below the search bar.



A list of the available macros will be displayed.

4. Select the desired macro.

A window will appear asking if you want to apply the macro.

5. Tap **Yes**.

   The line items from the macro are added to the highlighted rooms.

6. Tap **Done** in the top left corner.

Search XactContents

Searching XactContents is similar to searching price lists. Use keywords to find desired contents items.

1. Enter a keyword to search for.

2. Tap **Search**.
3. Scroll through the search results to find the desired item(s). Tap the item.

   The item window will open. Make any desired changed to the editable fields, and tap Save.

4. To search for more contents items, scroll to the top of the Add Items window and enter a new keyword.
5. When you are finished adding items, tap Done in the top right corner.

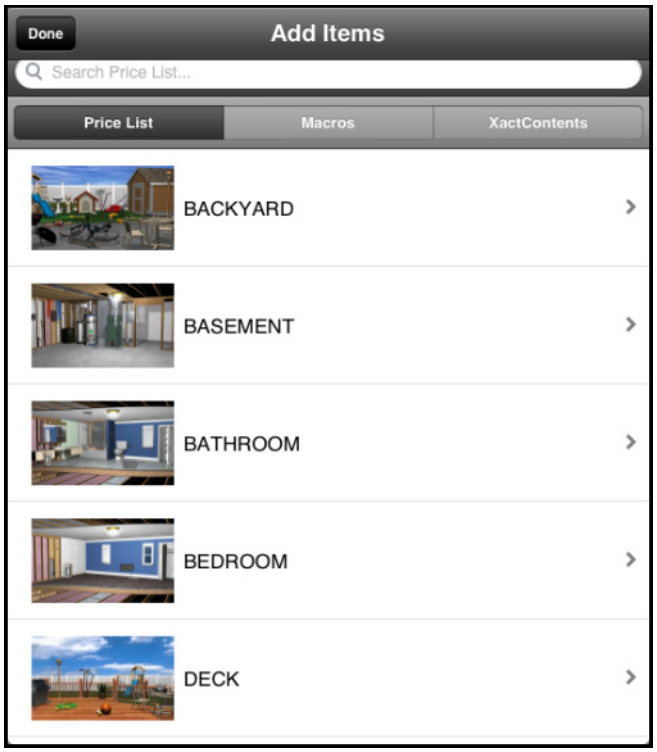
   The contents items have been added to the highlighted room(s).

Reference Search

To add items using reference search,

1. Highlight the room(s) to which you want to add line items.

2. Tap the '**+**' sign at the top of the *Sketch* screen.

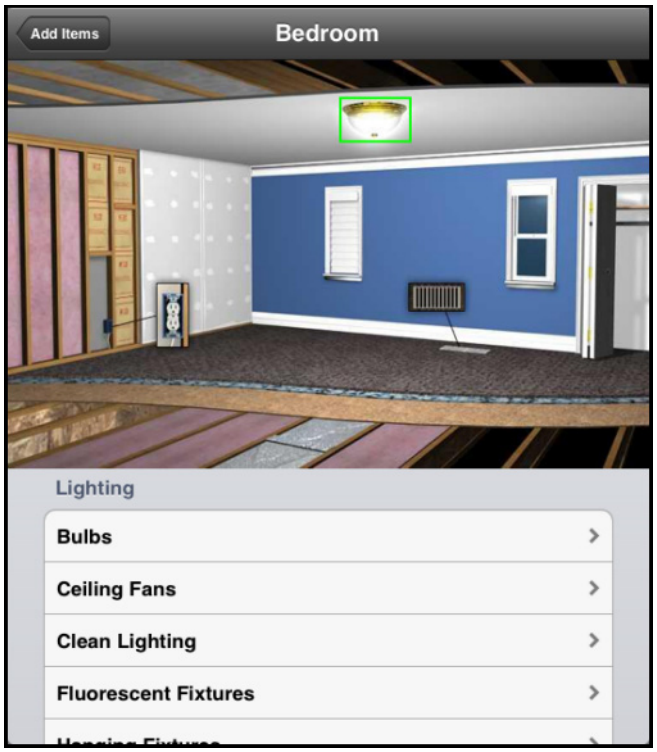


This will open the **Add Items** window. Below the search bar are several room types. You can scroll down to see more room types.

3. Select a room type.

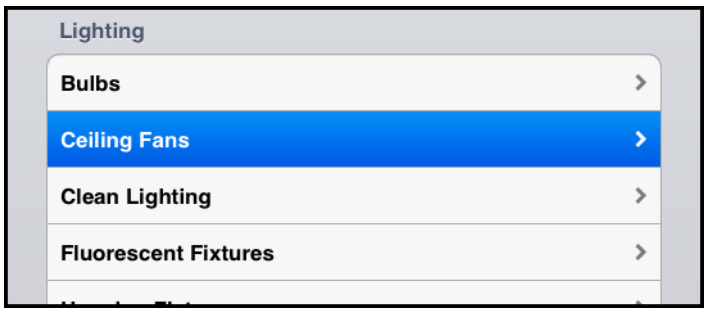
A graphical representation of the room will appear.

4. Tap on a section of the room to see items associated with that section.



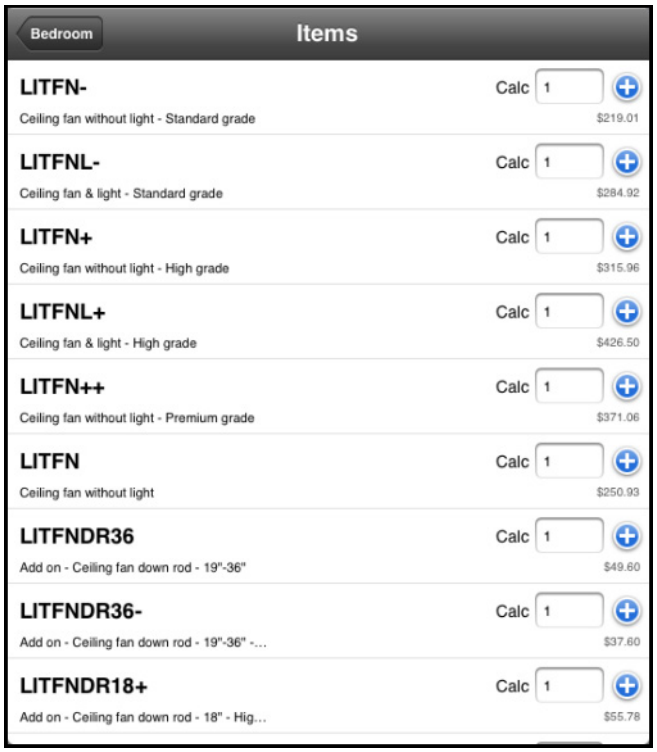
A green box will appear in the section that you have selected, and related categories will appear below the image.

5. Select the category associated with the line item(s) you are searching for to see a list of line items.



An Items screen will open with a list of line items associated with that section of the room.

6. Select the desired line items to add them to the highlighted room(s).



   The item screen will open where changes can be made to the item before saving it.

7. Tap Save after making any desired changes.

   The item is saved to the highlighted room(s).

8. You can add more items from the same category or you can select other room sections to view different items. You can also navigate back to the Add Items screen to select a different room type for search for more items.

9. When you are finished using Reference Search to add items, tap **Done**.

Viewing and Editing Line Items

At any point you can view and edit line items that you have added to any rooms. To do this,

1. Highlight the room(s) that has the items you want to view or edit.

2. Tap the **Items** button at the top of the *Sketch* screen.

   A list of items added to the highlighted room(s) will be displayed.

3. Tap on any item(s) you want to edit. The item window will open where you can make changes.

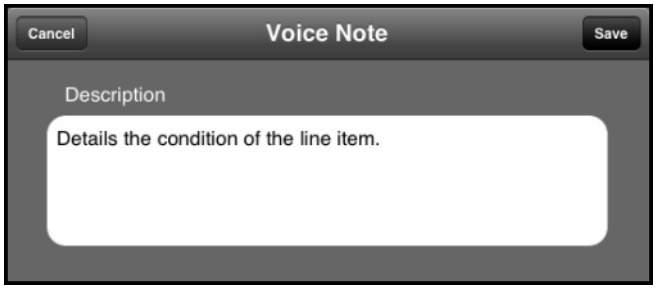
4. When you are done making changes, tap **Save** in the top right corner.

Voice Notes

You can add voice notes to items you have added in XactScope. To do this,

1. Access the item(s) to which you want to add a voice note by highlighting the room the item is in and tapping the **Items** button at the top of the Sketch screen.
2. Tap the item to which you want to add a voice note.This will open the item window.
3. Scroll down until you find the **Add Voice Note** field.

4. Tap Add Voice Note. The Voice Note window will open.
5. You can enter a description of the voice note in the description field.



6. To record a voice note, tap the white circle at the bottom left of the Voice Note window.

7. Speak into the device's speaker to record the voice note.

8. To pause the voice note with the intention of adding more to it, tap the pause button.

9. When you are finished creating the voice note, tap the Stop button.

Note: *You can only add one voice to a line item. If you tap stop and then try to record another voice note for an item that already has a voice note, you will be given the option to overwrite the existing voice note.*

10. When you are satisfied with the voice note, tap **Save** in the top right corner.

    The voice note is added to the line item.

TEXT NOTES

You can add Text Notes to items you have added in XactScope. To do this,

1. Access the item(s) to which you want to add a text note by highlighting the room the item is in and tapping the Items button at the top of the Sketch screen.

2. Tap the item to which you want to add a text note.This will open the item window.

3. Scroll down until you find the Text Note field.

   There are two ways to add a text note:

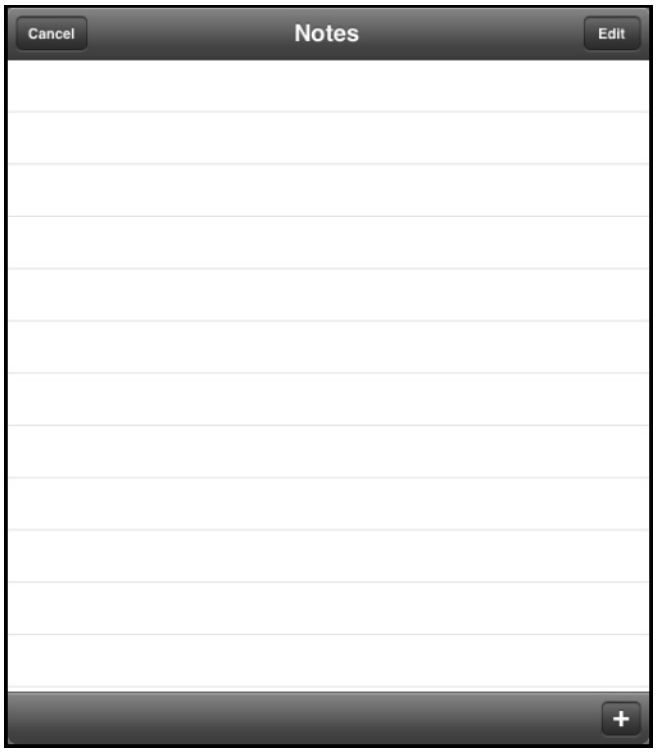
   a. Add a one-time text note that only applies to the current item, or
   b. Create a text note template that can be used over and over again.

4. To add a one-time text note, tap in the white space next to Text Note.

   The device's keyboard will appear.

5. Type in the desired text note.

6. To add a text note template, tap the blue arrow on the right of the text note field.

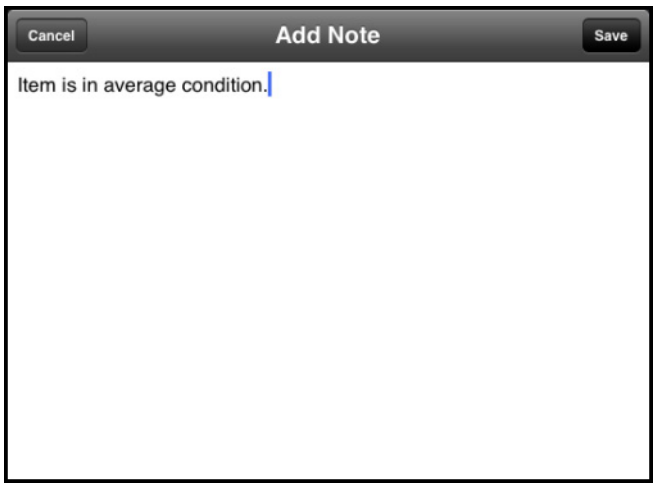


The Notes window will appear.

7. Tap the '**+**' sign in the bottom right corner.

This will open the Add Note window.

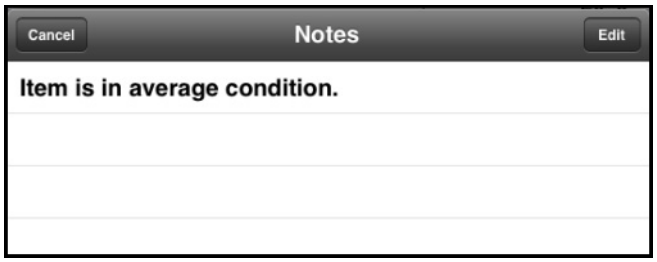
8. Use the device's keyboard to enter the text note template.



9. When you are finished, tap **Save**.

This will take you back to the Notes window. The text note you just created will appear in the list.

10. Select the text note to add it to the line item.



Note: You can only add one text note to a line item. If you try to add a text note template to a line item that already has one, the old text note will be replaced by the new one.

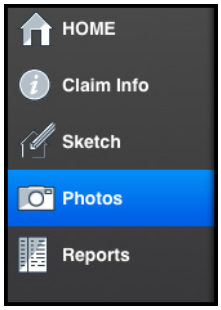
11. When you are satisfied with the text note, tap **Save** in the top right corner.

1. The text note is added to the line item.

PHOTOS

To add photos to an estimate,

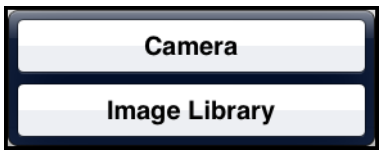
1. Select **Photos** from the *Navigation Menu*.



2. Tap the **camera icon** in the bottom right corner.

   This will give you two options:

   - **Camera** - Select Camera if you want to use the device's camera right now to take the photo and add it to the estimate.
   - **Image Library** - Select Image Library if the image you want to use has already been taken and is available in the device's image library.



   After either selecting the image from the image library or using the device's camera to take the image, a preview window will appear where you can move and scale the image.

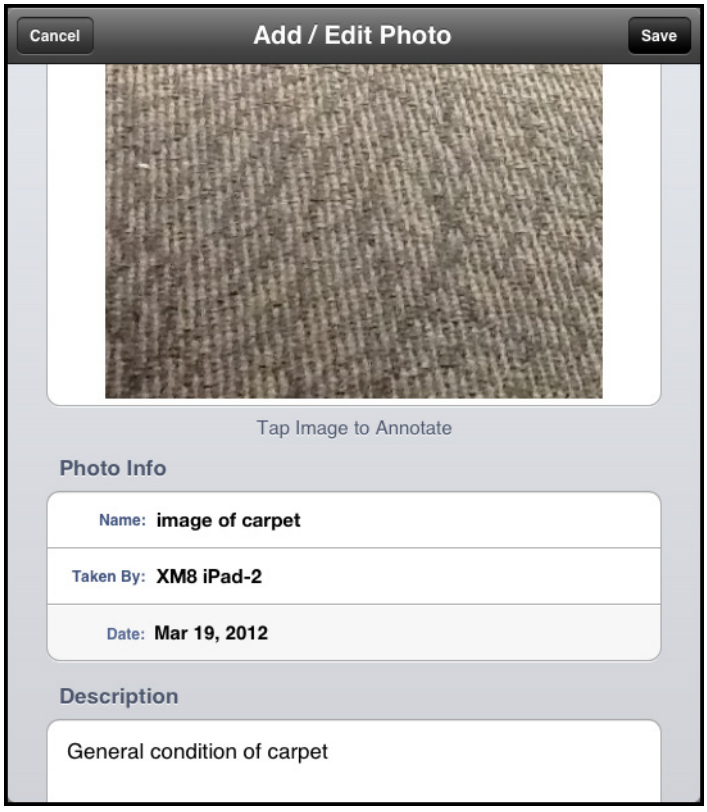
3. After moving and scaling the image, tap **Use**.

   The **Add/Edit Photo** window appears. A preview of the image is viewable in this window.

   From this window you can also:

- **Add annotations** to the image - Tap the image. The image will now fill the entire Add/Edit Photo window. **Press and drag** your finger where you want to add an annotation. A green box will appear, and **Clear** and **Text** button will appear beneath it. To add text, tap the Text button. The **Annotation Text window** will open. Enter your text and tap **Done**. To delete the annotation, tap Clear. When you are finished, tap **Save**. The annotation will be visible when you print estimate reports or when you transfer the estimate to Xactimate.
- Edit the image name
- Specify who took the image, or what device took the image
- Specify the date the image was taken
- Add a description of the image.

4. After adding information and editing the image, tap **Save**.



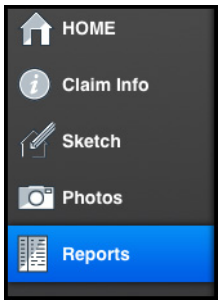
5. The image is now listed in the Photos window. The image is now attached to the estimate, and will appear when you transfer the estimate to Xactimate and when you print reports from the estimate.

REPORTS

You can add and print reports right from your mobile device using XactScope.

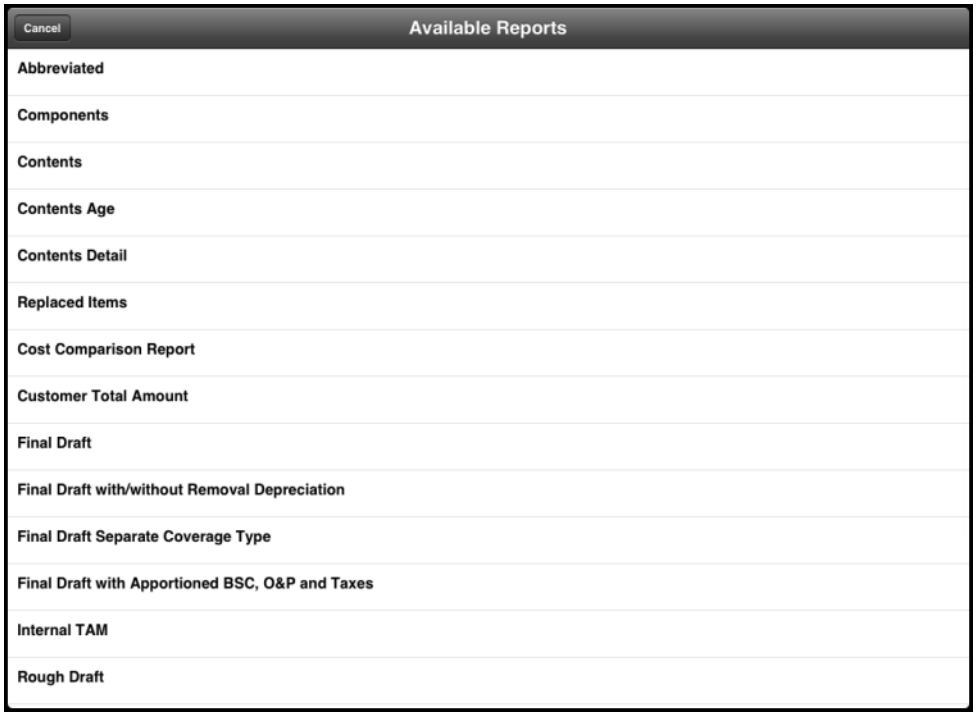
Note: *Printing reports from your iDevice will require an AirPrint-enabled printer synced with your iDevice.*

1. Select **Reports** from the *Navigation Menu*.



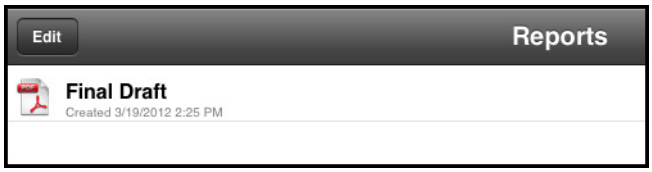
The Reports screen will appear.

2. Press the '**+**' button in the top right corner to add reports to the estimate.



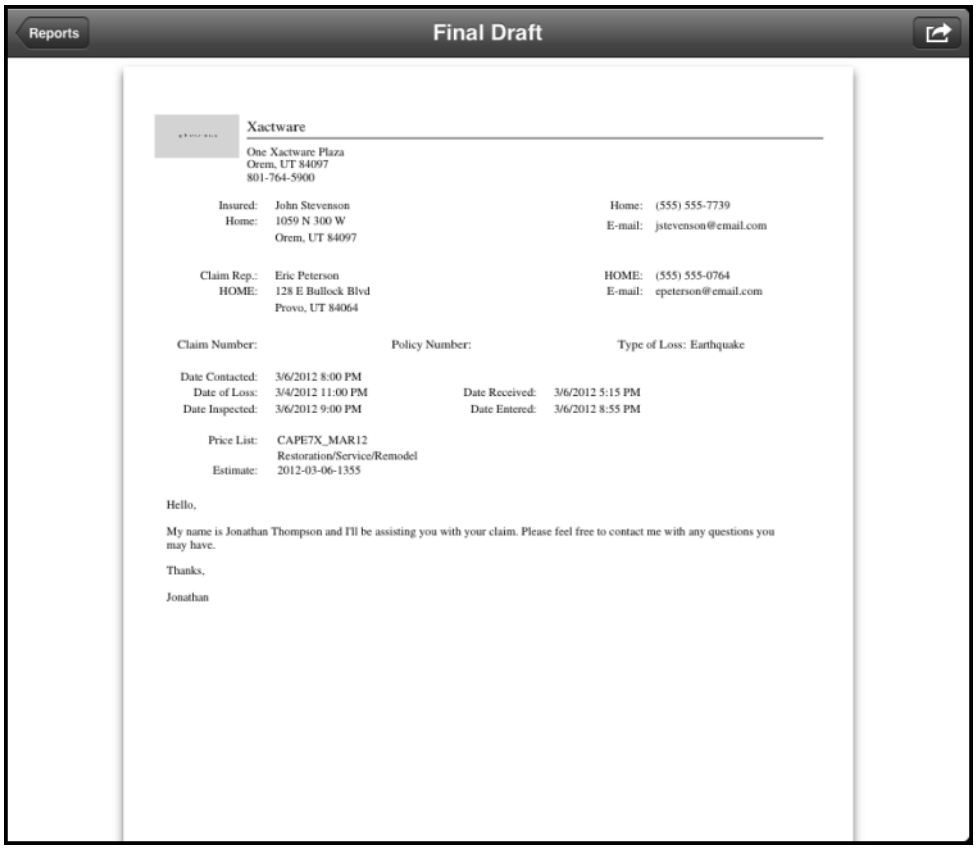
The Available Reports window will appear.

3. Tap the report you want to add to the estimate.



This will take you back to the **Reports** window, and a PDF of the requested report will be available in the Reports list.

4. Tap the report to view it.



A PDF of the report is made available.

5. To **email** or **print** the report, tap the Share button in the top right corner.

6. Select **Email** or **Print**.
   - Email - An email will appear. Tap send to send the email.
   - Print - You can determine what pages are printed and how many copies are printed. You can also search for the desired printer. The iDevice will search for any AirPrint-enabled printers in the vicinity.

TRANSFERRING ESTIMATES TO XACTIMATE FROM XACTSCOPE

To transfer an estimate to Xactimate,

1. Navigate to the *Home Screen*. On the right side of the Home Screen an **Upload** button is visible for each estimate.

2. Tap **Upload** for the estimate you want to transfer to Xactimate.

The estimate is sent to Xactimate.