

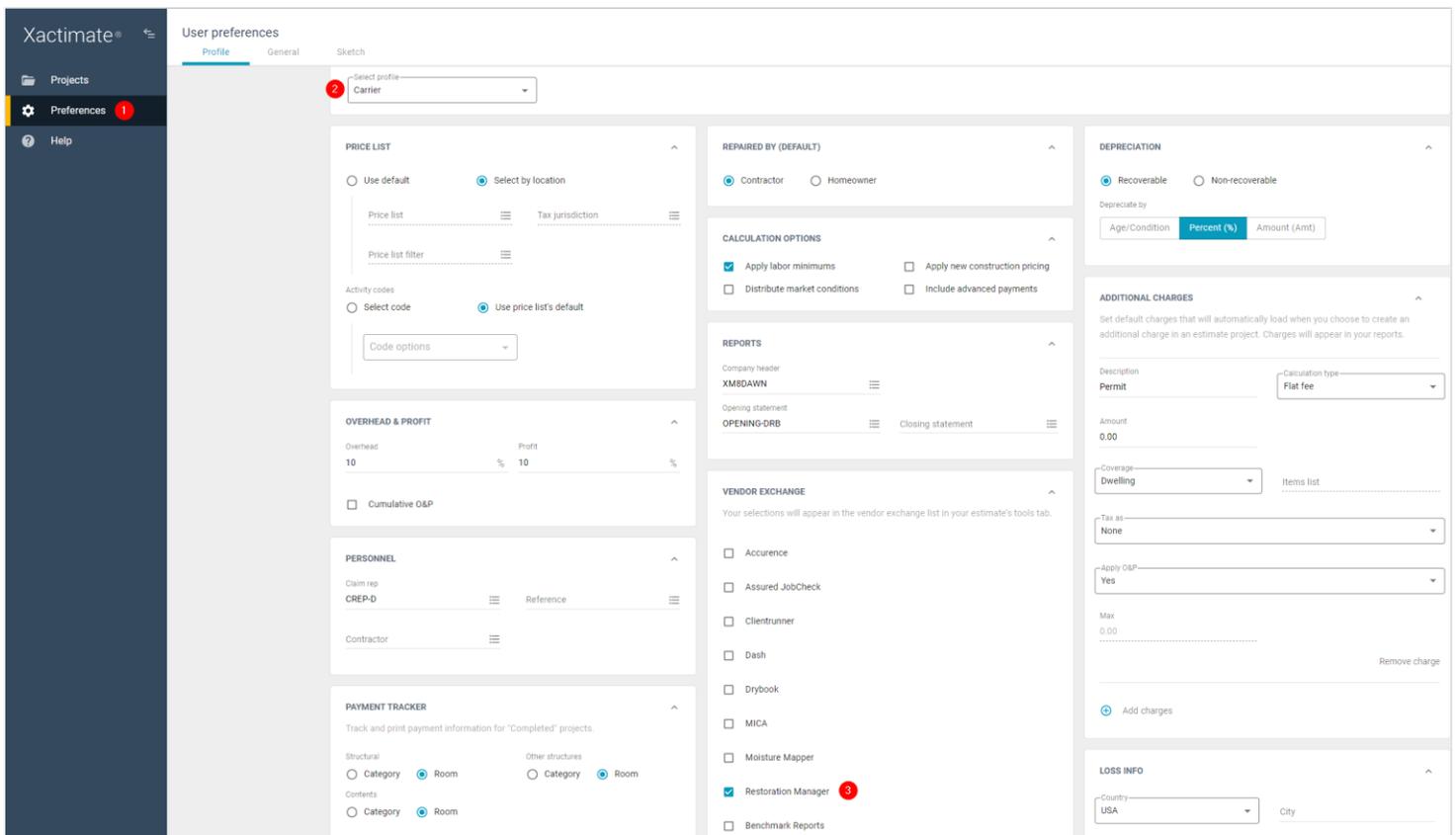
XOR/React - Exporting Estimates

The Estimating Integration takes the file, sends it to Restoration Manager, and integrates the data to the respective Job/Customer. The Estimating applications: Categories and Cost Types are mapped to the Estimate Cost Types in Restoration Manager.

Initial One-Time Setup:

1. From the menu select **Preferences**
2. From the **Profile** drop-down select Carrier
3. Within the **VENDOR EXCHANGE** card add a next to **Restoration Manager**
4. If BCS, RMS or WorkCenter 2.0 are pre-checked please uncheck these options.

Note: Complete steps (2-4) for the Contractor and default Contractor Connection profiles



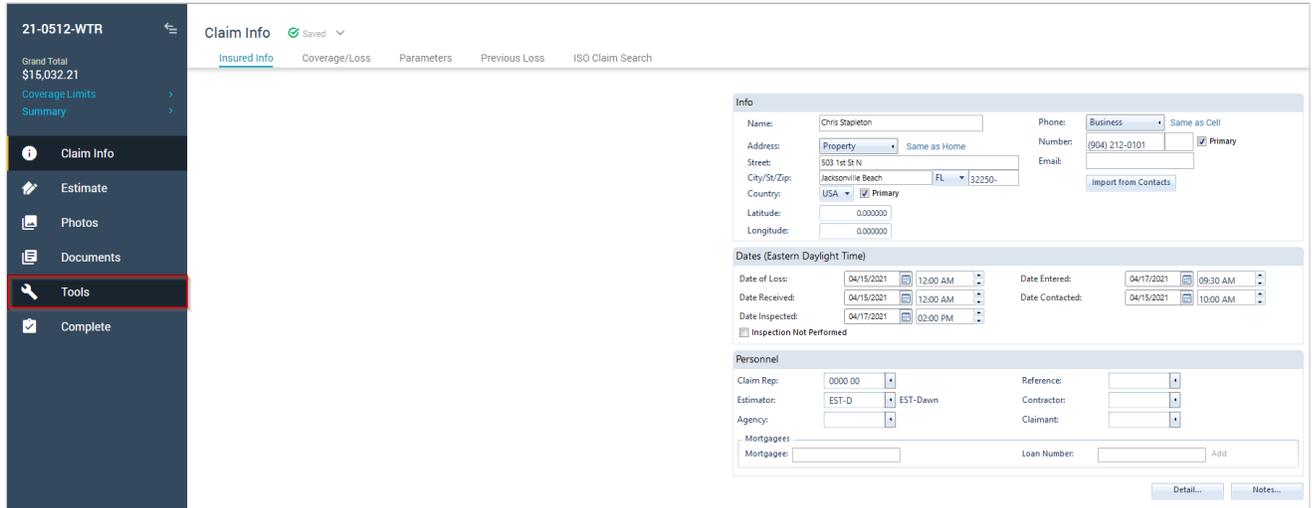
Note: The Vendor Exchange is only available by default within the Contractor, Carrier and default Contractor Connection profile is because many Carriers haven't gone through the process of having a custom profile created with the intent of being able to control which features are enabled/disabled. Xactware cannot simply add this feature to a custom profile without a request from the carrier to do so. If you would like to see Vendor Exchange as an option in a custom profile, you will need to reach out to the Insurance Carrier and ask if this is something, they would be willing to approve for their profile. Once Xactware receives written authorization from the carrier to add Vendor Exchange, the functionality takes between 4 -6 weeks to enable.

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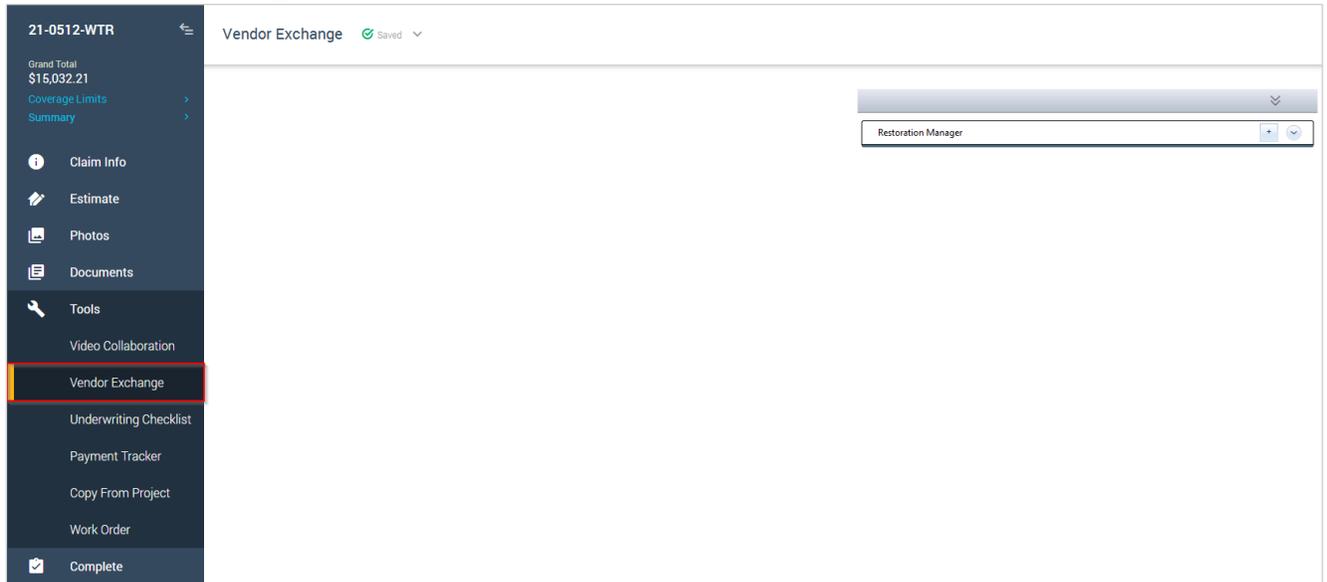
To export the estimate from Xactimate the Project must match the RM Job ID exactly unless the project was created directly from the Job in Restoration Manager using Send Job to Xactimate ©.

For more information on Send Job to Xactimate © please refer to the reference document on the University under Training Documents → Job Resources → Send Job to Xactimate

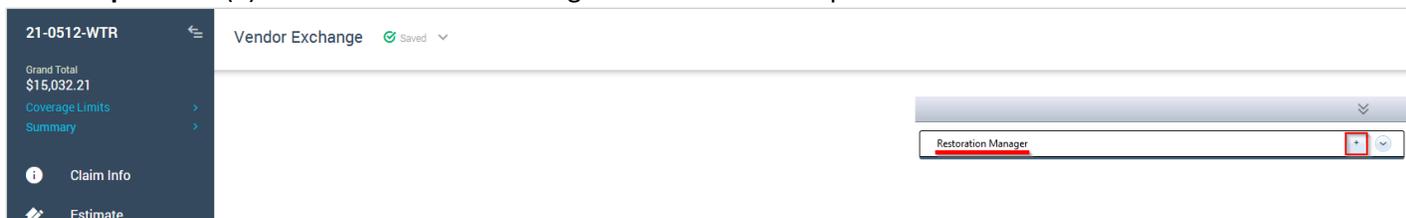
1. Double click the **Project** to Open
2. Single click **Tools** to expand



3. Tap on **Vendor Exchange**



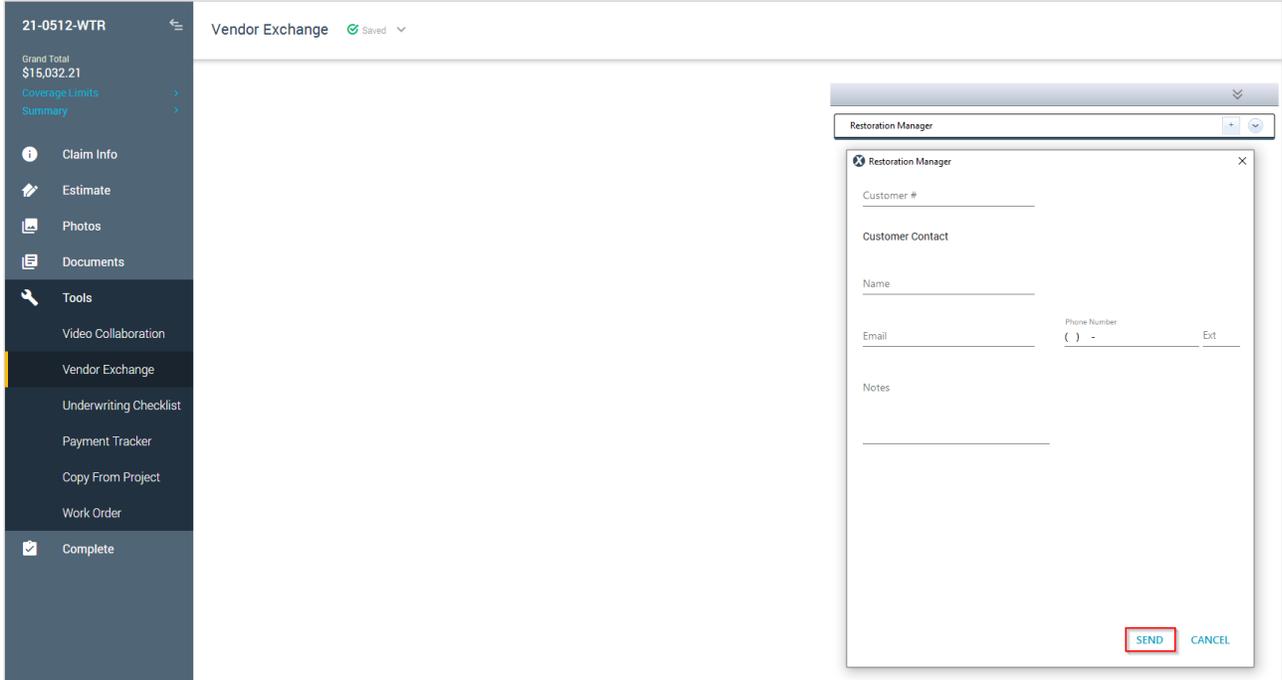
4. Click the **plus icon (+)** next to Restoration Manager to Create New Request



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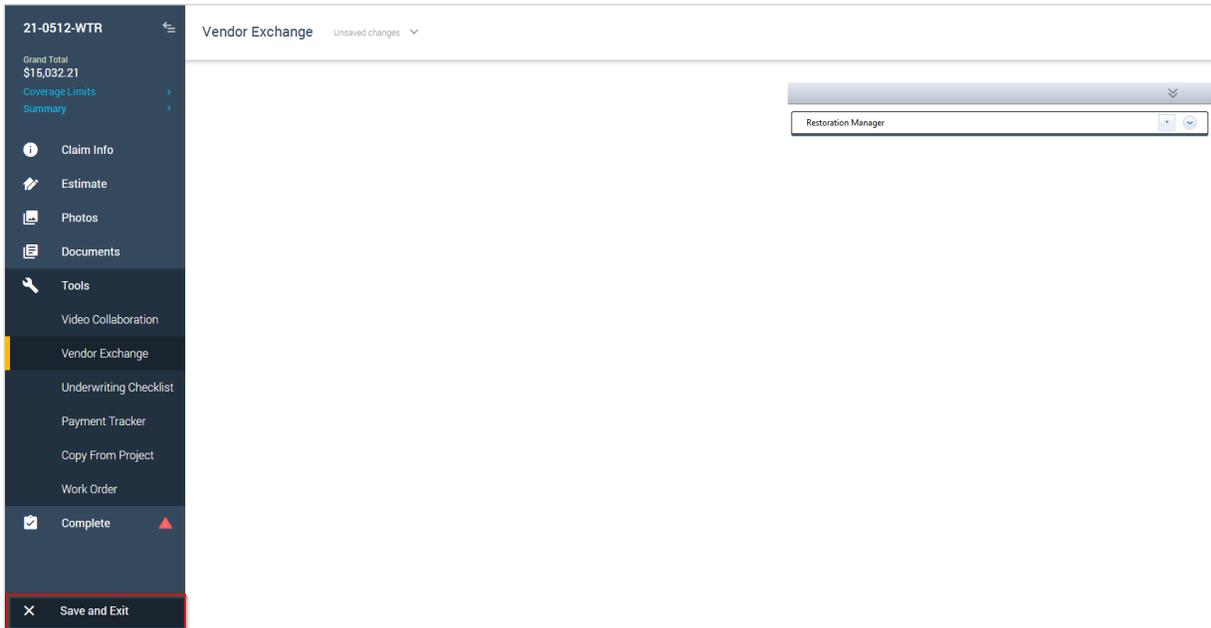
5. After clicking the **plus icon (+)** another pop-up will display, click **Send**

Note: You do not need to add any information within this pop-up to process the request successfully.



The screenshot shows the Restoration Manager interface. On the left is a dark sidebar with a menu including 'Claim Info', 'Estimate', 'Photos', 'Documents', 'Tools', 'Video Collaboration', 'Vendor Exchange', 'Underwriting Checklist', 'Payment Tracker', 'Copy From Project', 'Work Order', and 'Complete'. The main area is titled 'Vendor Exchange' and shows 'Grand Total \$15,032.21' and 'Coverage Limits Summary'. A 'Restoration Manager' pop-up window is open, containing fields for 'Customer #', 'Customer Contact', 'Name', 'Email', 'Phone Number', and 'Ext'. The 'SEND' button at the bottom right of the pop-up is highlighted with a red box.

6. **Save and Exit**



The screenshot shows the Restoration Manager interface. The sidebar menu is the same as in the previous screenshot. The main area is titled 'Vendor Exchange' and shows 'Unsaved changes'. The 'Save and Exit' button at the bottom of the sidebar is highlighted with a red box.

No Syncing Required. After **Save & Exit** is selected the file is processed by our server and the Estimate costs are uploaded to the respective Job within the Financials (Costs) Tab in Restoration Manager. It takes approximately 5-15 minutes to read and process the file.

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Change Orders, Supplements, Revisions, etc.

Scenario 1:

If you are adjusting the original estimate amount resend it to Restoration Manager using the steps above and it will override the previously uploaded estimate.

Scenario 2:

If you are creating a duplicate project in Xactimate to write a Supplement, Change Order, Revisions, etc. for a job prior to saving the project the project MUST match the RM Job ID exactly along with adding an underscore, dash, and then SUP, CO, REV, etc. after the last character of the Project ID.

Example Project: 21-0523-WTR_-SUP

Duplicate project

Profile *
Carrier

Project name
21-0523-WTR_-SUP

CANCEL DUPLICATE

Project	Claim number	Profile	Status	Owner	Estimator	Total
21-0523-WTR_-SUP		Carrier	In Progress	DBRYANT	SELF PAY (non insurance)	\$425.00
21-0523-WTR		Carrier	In Progress	DBRYANT	Alexander Viera	\$3,710.00

After Creating the Project and writing up the Estimate use the same steps above (pages 2-3) to send the Estimate to Restoration Manager.

Note: This format WILL NOT override the original estimate that was uploaded previously.

Example of the Supplement

Click Financials → Single click the row to expand → Click Estimate Breakdown to view the Original Estimate and the SUP, CO, etc. amounts.

Loss Type	Loss Number	Estimate	Actual Exp.	Gross Profit	GP%
Water		\$4,135.00	\$0.00	\$4,135.00	100%

	Estimate	Budget to Actual Exp.		Gross Profit		
		%			Budget	Actual Exp.
Materials	\$848.80			\$0.00	100.00%	100.00%
Labor	\$1,670.40			\$0.00	100.00%	100.00%
Sub/Tech	\$0.00			\$0.00		
Labor Burden %	\$299.52			\$0.00	100.00%	100.00%
Sub/Tech Burden %	\$0.00			\$0.00		
Equipment	\$137.10			\$0.00	100.00%	100.00%
Other/Mileage	\$1,179.26			\$0.00	100.00%	100.00%
Total	\$4,135.00			\$0.00		100.00%

Estimate Breakdown by Source	
Original Estimate:	\$3,710.00
SUP:	\$425.00



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Additional Information:

If you're trying to send an Estimate from any other profile other than the Carrier, Contractor or the default Contractor Connection the Estimate will need to be duplicated and saved in the Carrier/Contractor profile to export the Estimate using the steps above.

For any technical issues please reach out to our Technical Support Department directly at servicesoftware support@verisk.com or 303-625-7814. Thank you!