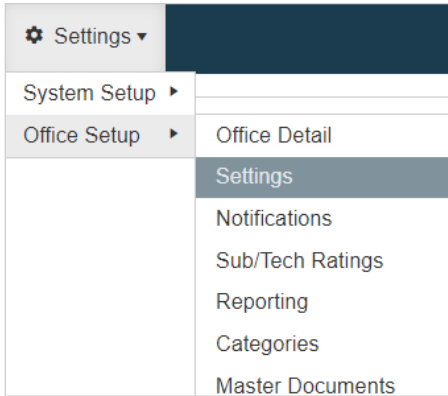


Send Job to Xactimate ©

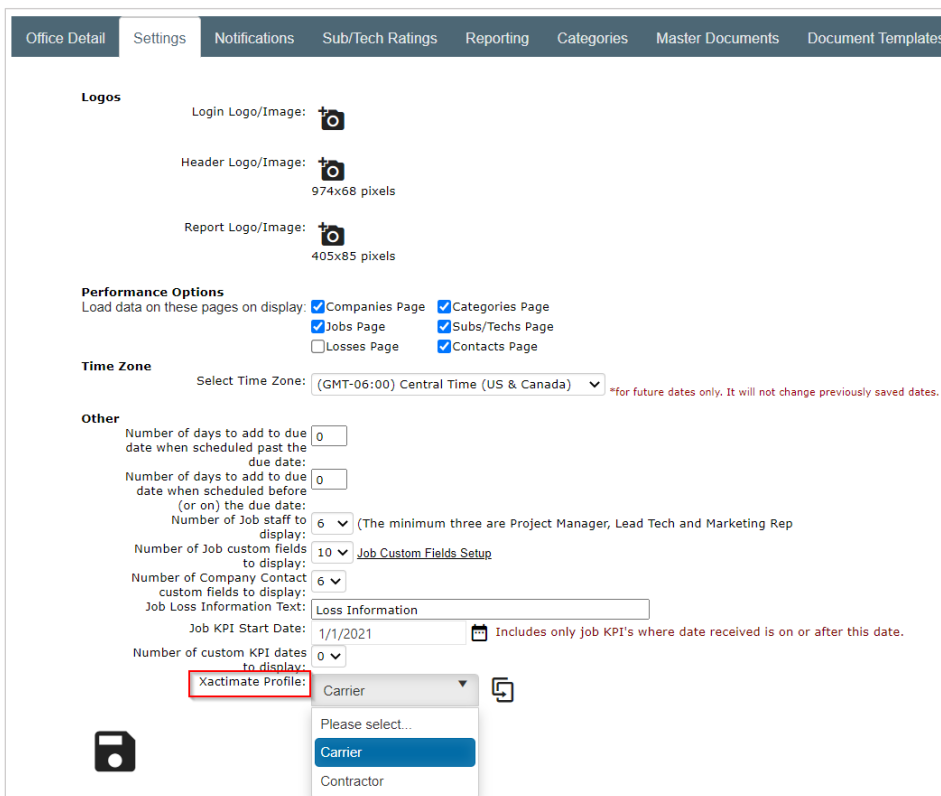
Sending jobs to Xactimate from Restoration Manager will eliminate the need to manually create the job in Xactimate.

When using Send Job to Xactimate feature you can select which profile (Contractor/Carrier) the Xactimate Project shell is created within. The administrator can set this up by going to Settings → Office Setup → Settings → **Other**, Xactimate Profile



To Complete the Xactimate Profile Setup

- Select the profile (Contractor/Carrier) from the drop-down
- Select Save (📁)
- After selecting Save, the profile selection can be applied to the other offices by selecting the apply to All Offices icon (📄).

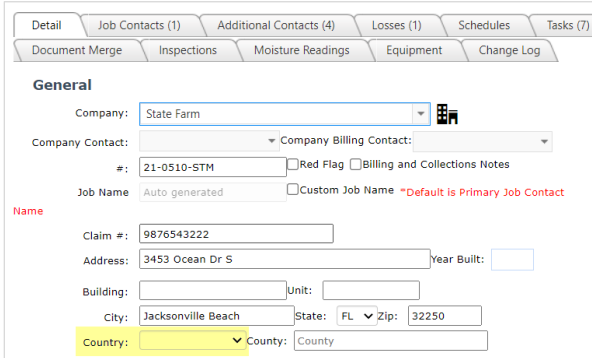


Important: Sending jobs to Xactimate from Restoration Manager will not affect XactAnalysis assignment metrics or KPIs.

Send Job to Xactimate ©

Customers outside of the United States please note that the Country is **required** and **must** be applied to the Job in Restoration Manager as well as the Primary Contact record otherwise the Send Job to Xactimate© will fail.

Job Record – Country Field



Detail | Job Contacts (1) | Additional Contacts (4) | Losses (1) | Schedules | Tasks (7)

Document Merge | Inspections | Moisture Readings | Equipment | Change Log

General

Company: State Farm

Company Contact: Company Billing Contact:

#: 21-0510-STM Red Flag Billing and Collections Notes

Job Name: Auto generated Custom Job Name **Default is Primary Job Contact**

Name

Claim #: 9876543222

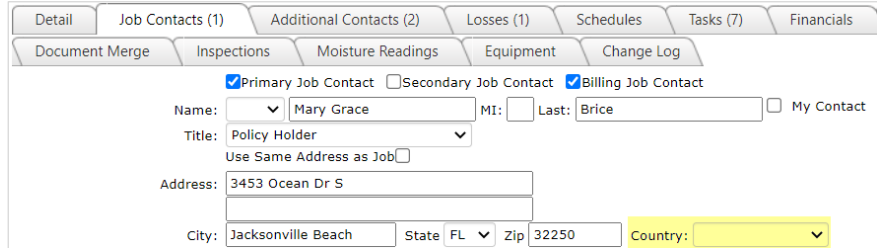
Address: 3453 Ocean Dr S Year Built:

Building: Unit:

City: Jacksonville Beach State: FL Zip: 32250

Country: Country County: County

Primary Contact Record – Country Field



Detail | Job Contacts (1) | Additional Contacts (2) | Losses (1) | Schedules | Tasks (7) | Financials

Document Merge | Inspections | Moisture Readings | Equipment | Change Log

Primary Job Contact Secondary Job Contact Billing Job Contact

Name: Mary Grace MI: Last: Brice My Contact

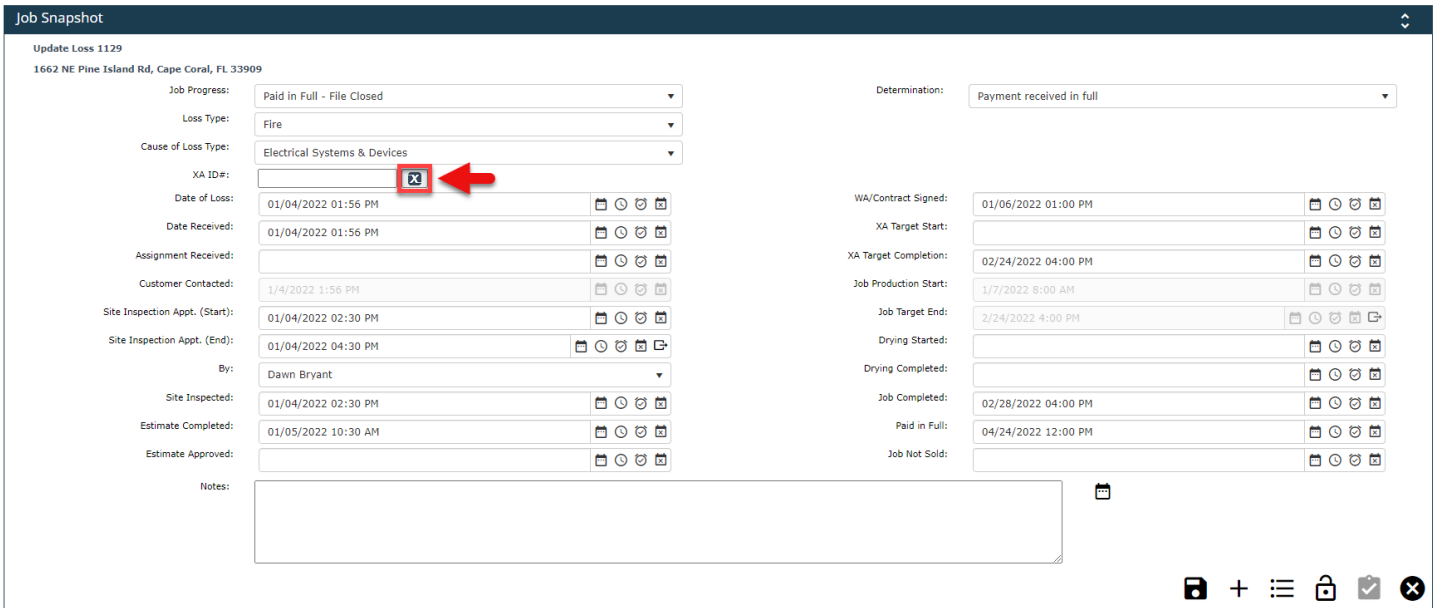
Title: Policy Holder

Use Same Address as Job

Address: 3453 Ocean Dr S

City: Jacksonville Beach State: FL Zip: 32250 Country:

To create the Project in Xactimate in Restoration Manager go to a Job, click on the Job Snapshot to expand then select the **Send Job to Xactimate©** button.



Job Snapshot

Update Loss 1129
1662 NE Pine Island Rd, Cape Coral, FL 33909

Job Progress: Paid in Full - File Closed

Loss Type: Fire

Cause of Loss Type: Electrical Systems & Devices

XA ID#: X ←

Date of Loss: 01/04/2022 01:56 PM

Date Received: 01/04/2022 01:56 PM

Assignment Received:

Customer Contacted: 1/4/2022 1:56 PM

Site Inspection Appt. (Start): 01/04/2022 02:30 PM

Site Inspection Appt. (End): 01/04/2022 04:30 PM

By: Dawn Bryant

Site Inspected: 01/04/2022 02:30 PM

Estimate Completed: 01/05/2022 10:30 AM

Estimate Approved:

Notes:

Determination: Payment received in full

WA/Contract Signed: 01/06/2022 01:00 PM

XA Target Start:

XA Target Completion: 02/24/2022 04:00 PM

Job Production Start: 1/7/2022 8:00 AM

Job Target End: 2/24/2022 4:00 PM

Drying Started:

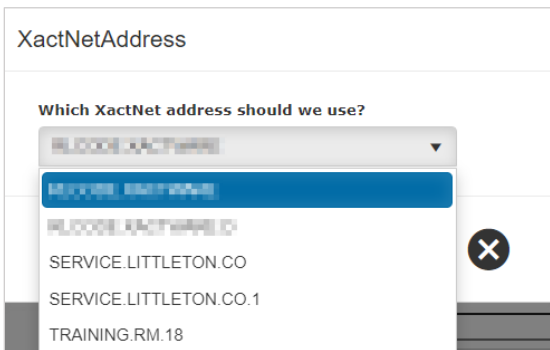
Drying Completed:

Job Completed: 02/28/2022 04:00 PM

Paid in Full: 04/24/2022 12:00 PM

Job Not Sold:

If you have more than one XactNET Address a pop-up will display, select which XactNET Address you want to send the job to.



XactNetAddress

Which XactNet address should we use?

BLUCCO.XACTNET

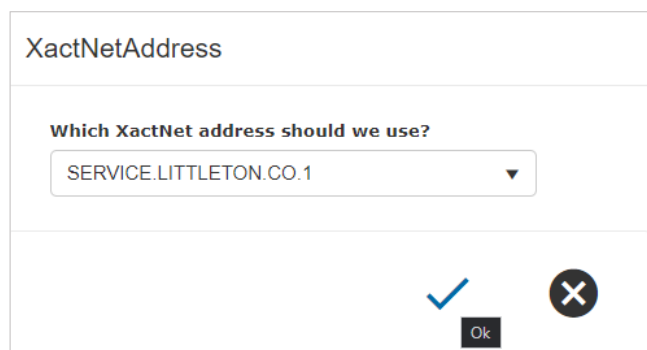
SERVICE.LITTLETON.CO

BLUCCO.XACTNET.0

SERVICE.LITTLETON.CO

SERVICE.LITTLETON.CO.1

TRAINING.RM.18



XactNetAddress

Which XactNet address should we use?

SERVICE.LITTLETON.CO.1

Ok



Send Job to Xactimate ©

PENDING will display within the Job Snapshot until the Xactimate Project is created which takes approximately 3-5 minutes.

Job Snapshot

Update Loss 1129
1662 NE Pine Island Rd, Cape Coral, FL 33909

Job Progress:

Loss Type:

Cause of Loss Type:

XA ID#: **PENDING**

After 3-5 minutes refresh the RM Job page, if the Xactimate Project was created successfully the Xactimate icon will display within the Job Header. Also a unique XA TRANS ID# (MFN #) will display within the Job Snapshot.

Office: Sunshine Restoration

Job Name: Mary Grace Brice

Job #: 21-0510-STM

Job Progress **WA/Contract Signed**

Loss Type: Storm Damage

Cause of Loss: Wind



Mary Grace Brice, Policy Holder +1 (303) 800-5182 Cell dbryant@verisk.com
3453 Ocean Dr S, Jacksonville Beach, FL 32250



Job Snapshot

Job Progress:

Loss Type:

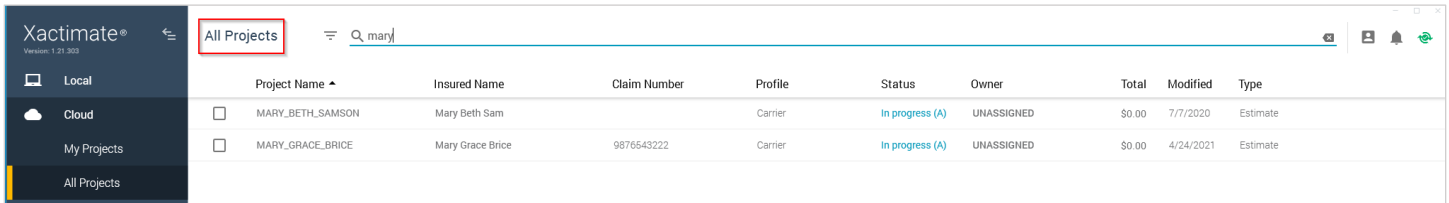
Cause of Loss Type:

XA ID#:

If the Xactimate icon doesn't display within the Job Header expand the Job Snapshot. If a **FAILED** displays hover over **FAILED** to view why the failure occurred. Correct the issue and the Job should now successfully send to Xactimate.

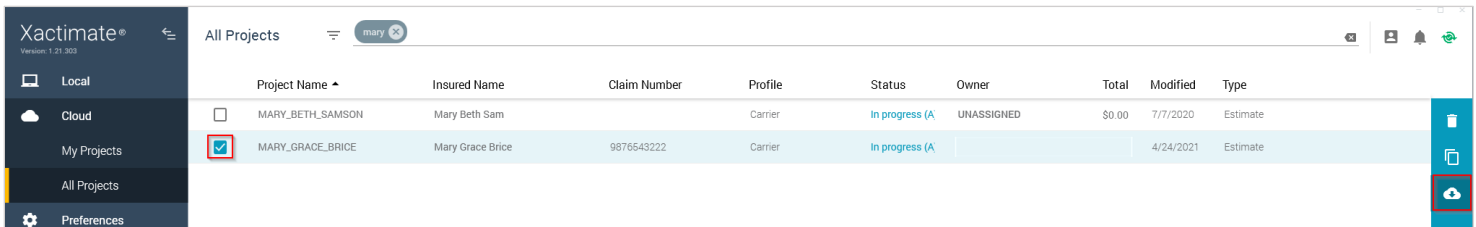
Send Job to Xactimate ©

1. To locate the Project in In Xactimate search within **All Projects**.



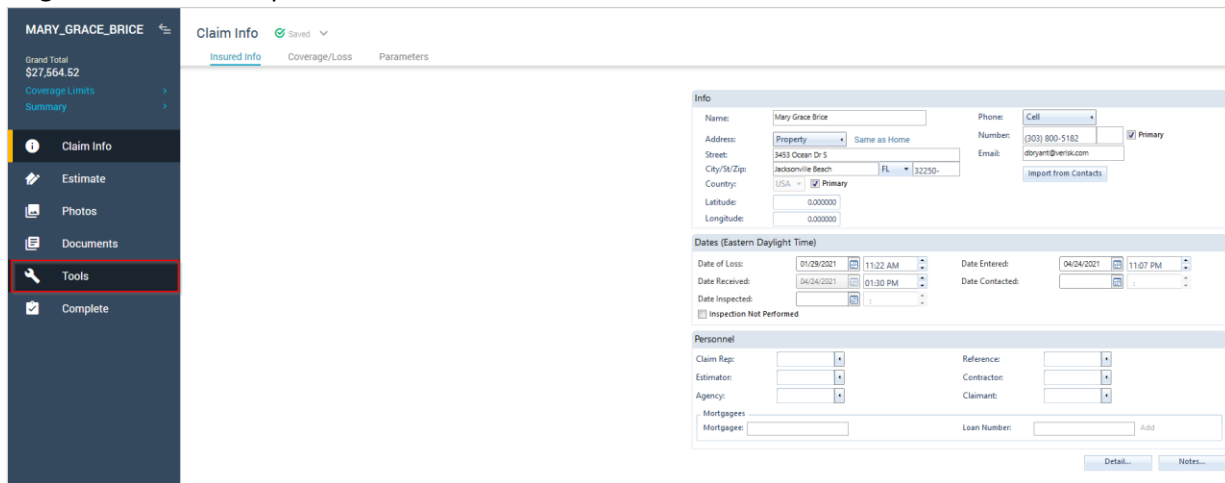
Project Name	Insured Name	Claim Number	Profile	Status	Owner	Total	Modified	Type
<input type="checkbox"/> MARY_BETH_SAMSON	Mary Beth Sam		Carrier	In progress (A)	UNASSIGNED	\$0.00	7/7/2020	Estimate
<input type="checkbox"/> MARY_GRACE_BRICE	Mary Grace Brice	9876543222	Carrier	In progress (A)	UNASSIGNED	\$0.00	4/24/2021	Estimate

2. Select the Project then then the cloud icon to Download the Project to Local



Project Name	Insured Name	Claim Number	Profile	Status	Owner	Total	Modified	Type
<input type="checkbox"/> MARY_BETH_SAMSON	Mary Beth Sam		Carrier	In progress (A)	UNASSIGNED	\$0.00	7/7/2020	Estimate
<input checked="" type="checkbox"/> MARY_GRACE_BRICE	Mary Grace Brice	9876543222	Carrier	In progress (A)			4/24/2021	Estimate

3. When the Estimate is written then, double click the **Project** to Open
4. Single click **Tools** to expand



MARY_GRACE_BRICE Claim Info saved

Grand Total: \$27,564.52
Coverage Limits
Summary

Tools

Info

Name: Mary Grace Brice Phone: Cell
Address: Property Same as Home Number: (303) 800-5182
Street: 3453 Ocean Dr S Email: dgraym@verisk.com
City/St/Zip: Jacksonville Beach FL 32250
Country: USA Primary
Latitude: 0.000000
Longitude: 0.000000

Dates (Eastern Daylight Time)

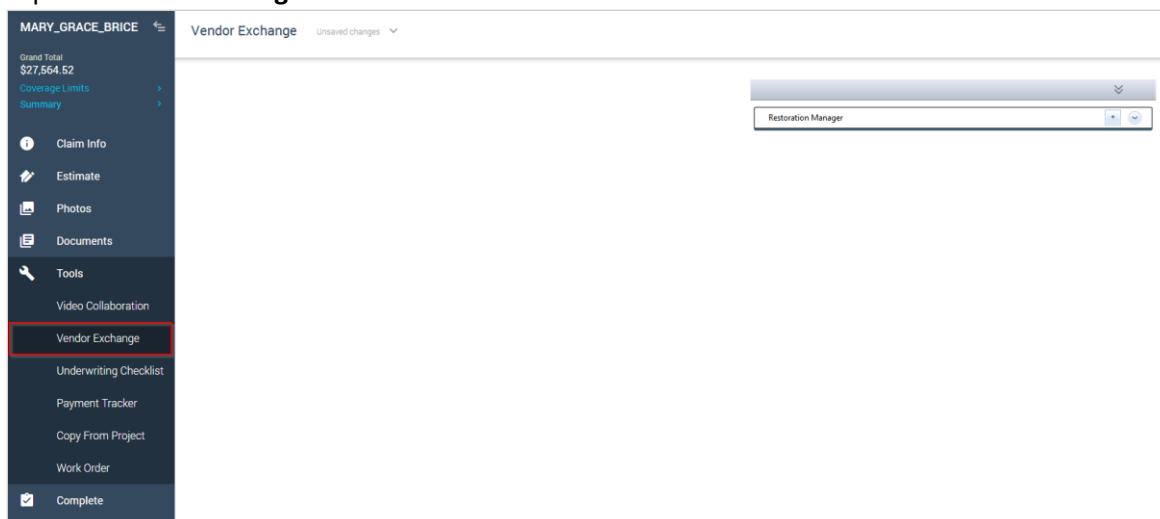
Date of Loss: 01/29/2021 11:22 AM Date Entered: 04/24/2021 11:07 PM
Date Received: 04/24/2021 01:30 PM Date Contacted:
Date Inspected:
Inspection Not Performed

Personnel

Claim Rep: Reference:
Estimator: Contractor:
Agency: Claimant:
Mortgages: Loan Number: Add

Detail... Notes...

5. Tap on **Vendor Exchange**



MARY_GRACE_BRICE Vendor Exchange Unsaved changes

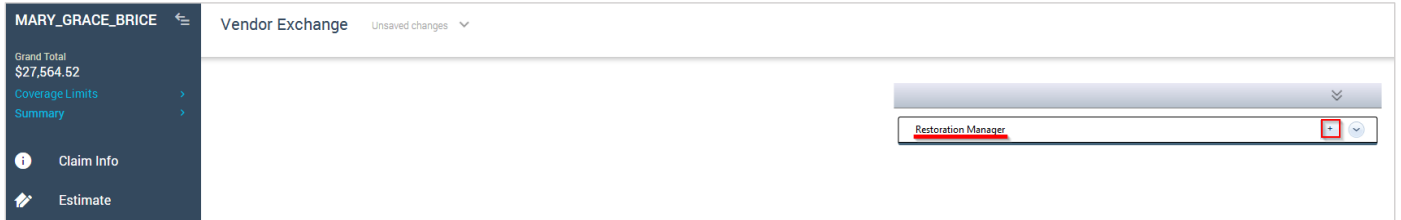
Grand Total: \$27,564.52
Coverage Limits
Summary

Vendor Exchange

Restoration Manager

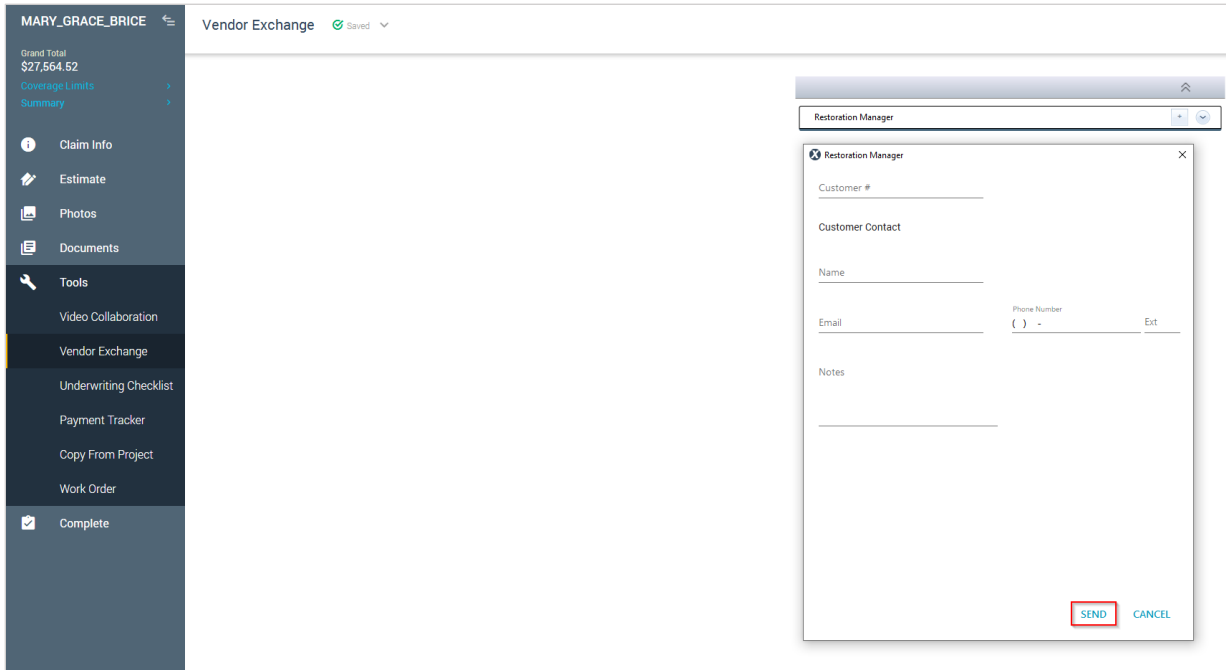
Send Job to Xactimate ©

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

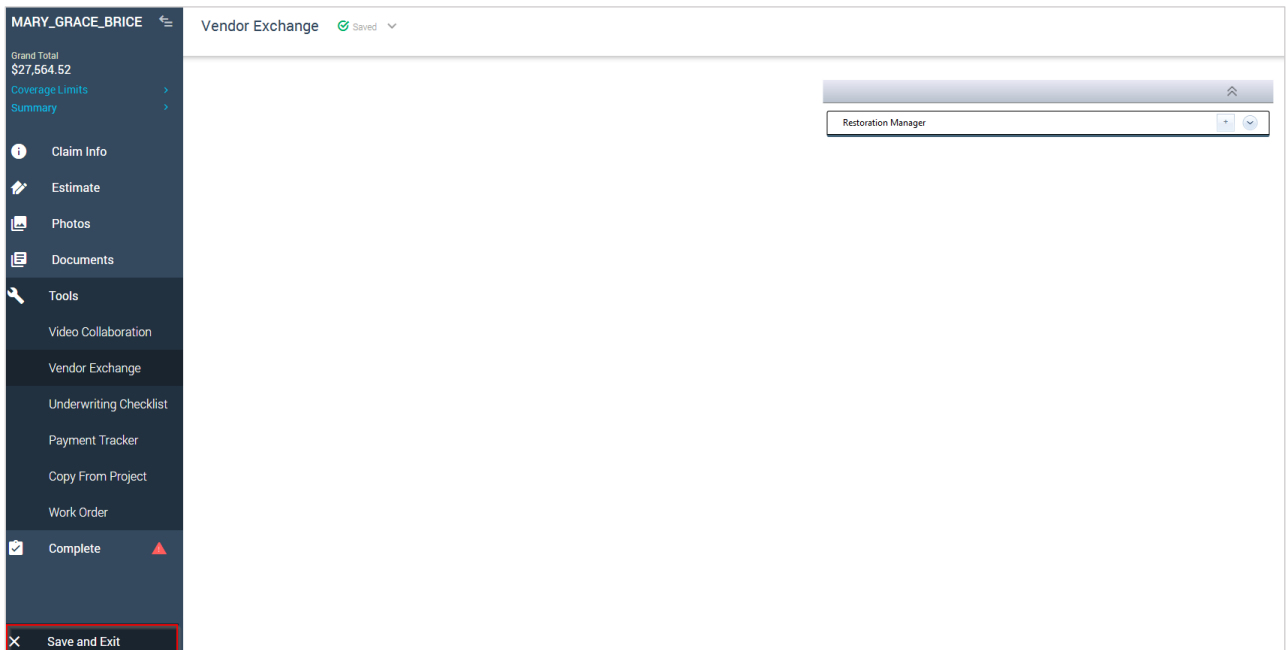


7. After clicking the **plus icon (+)** another pop-up will display, click **Send**

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

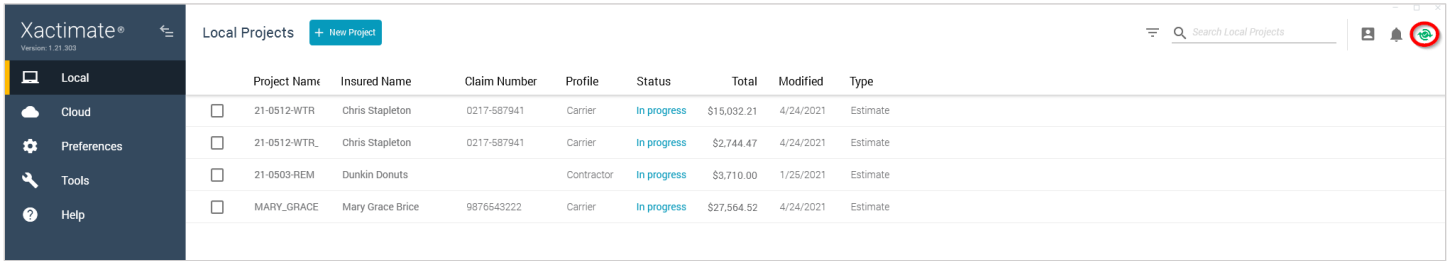


8. **Save and Exit**



Send Job to Xactimate ©

9. Tap the Sync icon to connect



Project Name	Insured Name	Claim Number	Profile	Status	Total	Modified	Type
21-0512-WTR	Chris Stapleton	0217-587941	Carrier	In progress	\$15,032.21	4/24/2021	Estimate
21-0512-WTR	Chris Stapleton	0217-587941	Carrier	In progress	\$2,744.47	4/24/2021	Estimate
21-0503-REM	Dunkin Donuts		Contractor	In progress	\$3,710.00	1/25/2021	Estimate
MARY_GRACE	Mary Grace Brice	9876543222	Carrier	In progress	\$27,564.52	4/24/2021	Estimate

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.

Loss Type	Loss Number	Estimate	Actual Exp.	Gross Profit	GP%
Storm Damage		\$27,564.52	\$0.00	\$27,564.52	100%

Loss Type: Storm Damage

	Estimate	Budget	Actual Exp.	Budget to Actual Exp.		Gross Profit	
				\$	%	Budget	Actual Exp.
Materials	\$6,773.16	\$0.00	\$0.00	\$0.00		100.00%	100.00%
Labor	\$16,892.12	\$0.00	\$0.00	\$0.00		100.00%	100.00%
Sub/Tech	\$0.00	\$0.00	\$0.00	\$0.00			
Labor Burden %	\$3,831.74	\$0.00	\$0.00	\$0.00		100.00%	100.00%
Sub/Tech Burden %	\$0.00	\$0.00	\$0.00	\$0.00			
Equipment	\$0.00	\$0.00	\$0.00	\$0.00			
Other/Mileage	\$67.50	\$0.00	\$0.00	\$0.00		100.00%	100.00%
Total	\$27,564.52	\$0.00	\$0.00	\$0.00			

[Estimate Breakdown](#)
[Remove Estimate](#)
 Last Line Item: 04/24/2021

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. 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: 21-0521-STR_-SUP**

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

For any technical issues please reach out to our Technical Support Department directly at servicesoftware@verisk.com.