

Level 1 Certification Exam – Xactimate Fundamentals

This Level 1 Certification Exam verifies that the user has the foundational skills required to create an estimate from start to finish using Xactimate 28.

The Level 1 Certification Exam is broken into three different sections. The three sections are as follows:

1. **Sketch and Scope Lab:** In this hands-on lab, individuals are required to use their own locally installed Xactimate (or online version) to create an estimate. The most recent version of Xactimate 28 is required. The estimate consists of a Sketch and scope scenario that must be completed accurately. The estimate will be used to answer the questions found in the Practical Exam section. The Sketch and Scope labs are not timed, and individuals may exit and return to the lab as needed prior to beginning the Practical Exam and Knowledge Exam. The approximate time required to complete this section is 60–120 minutes.
2. **Practical Exam:** In this section of the exam, individuals are asked 30 questions pertaining to the estimate created in the Sketch and Scope labs. Questions are specific to the scope, quantities, dimensions, and pricing from the estimate. This section of the exam is timed. Closing the Practical Exam prior to completion will result in an automatic FAIL. The approximate time required to complete this section is 30–90 minutes.
3. **Knowledge Exam:** This portion of the exam consists of 30 multiple-choice, true/false, and matching questions. Questions are related to the learning objectives listed below in the Knowledge Requirements section of this document. This section of the exam is timed. Closing the Knowledge Exam prior to completion will result in an automatic FAIL. The approximate time required to complete this section is 30–90 minutes. Passing grade is 70%. The time limit for the Practical Exam and Knowledge Exam is 180 minutes. Results with associated learning objectives will be available for review immediately upon completing the exam.

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Knowledge Requirements: Individuals will be required to demonstrate that the following learning objectives have been met:

Learning Objective Description

- The user demonstrates understanding of the 4-step estimating process, connecting to XactAnalysis, downloading assignments, Projects tab, Control Center.

- The user demonstrates understanding of Claim Information including: insured name, multiple addresses/phone numbers, estimator/reference info, policy/claim info, deductible, price list, tax jurisdiction, activity defaults, overhead and profit, company header.
- The user demonstrates understanding of Sketch windows, Tools, Search pane, Sketch workspace, Items section, View Tools, Plan View, Zoom to Selection, Zoom In, Zoom to Extents, Pan Tool, 3-D View.
- The user demonstrates understanding of Room Features, such as Wall Handle, Wall Thickness, Interior/Exterior Dimensions, Room Properties, Ceiling Type/Height, Square Break Tool, Custom Staircase Tool, Doors, Windows, Sign/Click and Drag method, Deduct Openings, Missing Walls, Basic Room Variables F, PF, W, WC, C PC.
- The user demonstrates understanding of Estimate Items, Quick Entry, Grouping, Search/Macros, Category code, Selector code, Activity, Description, Calculation, Unit Price, Unit of Measure, Click for Detail, Reference/Keyword Search, Home Link, Predictive Text.
- The user can complete and print an estimate in Xactimate.
- The user demonstrates understanding of marking an estimate “Completed,” required information, changing estimate status to “Completed,” Print Options, View/Print Reports, Export/Email PDF File, types of Estimate Reports.
- The user demonstrates a basic understanding of Roof InSight™, including how to order it, what it does, and how to access Roof InSight data and reports
- The user demonstrates understanding of Measurement View, Measurement Locks, Roof Annotations, Roof Tool, Roof Properties, Roof Types, such as Gable, Flat/Shed, Hip, Partial Hip, Dutch Hip, Half Hip, Gambrel, Barrel, Turret, Manual, Square Break Tool, Roof Overbuild, Roof Subgroup, basic roof variables SQ, SF, P, R.
- The user demonstrates understanding of the Projects tab, Xactimate Help, Data Transfer, Sharing/Copying Data such as estimates, price lists, and macros.
- The user demonstrates understanding of the three methods for updating prices, price list updates, naming convention of a price list.

Recommended Preparations:

1. Attend an Xactimate 28 Training Class
 - Xactimate 28 training classes are offered in a variety of convenient forms, including self-paced, virtual classroom (online), and classroom formats. Visit www.xactware.com/training for more details on class availability.
2. Review the Xactimate 28 Training Workbook
 - This 300-page workbook is a great resource to help prepare for the Level 1 Certification Exam. Visit www.xactware.com/store to order a copy.
3. Online Certification Preparation Course

- This two-hour refresher course will help prepare an individual for the exam. Class participants will be taught individually by one of Xactware's Certified Trainers. Visit us at www.xactware.com and schedule a class.

Certification Benefits:

If you are a professional working in the insurance, building and repair industry, you recognize the value of an accurate repair estimate. Xactimate certification validates that a user has the knowledge to accurately create an estimate in Xactimate. Benefits of being a certified Xactimate user include:

- Marketing yourself as one of the best Xactimate users in the business.
- Giving employers confidence that you are a certified Level 1 Xactimate user.
- Having the opportunity to be listed in the User Certification Directory.
- Receiving a Level 1 certificate.