How-to Guide: XML

Get the most out of the features in PowerClaim XML

Overview:

Contact Us

Support – Training – Authorizations

Phone: (800) 736-1246

Email: support@powerclaim.com

Hours: 8am-5pm (Central) M-F

Web: http://www.powerclaim.com/

1. Global Settings

Change settings for all <u>NEW</u> claims

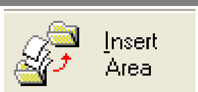
1. Click on the **Tools** menu and select **Preferences**, then click on **Default Estimate Settings** in the window that opens.
2. You can change the region, default tax, default O&P, etc.

2. Estimate Settings

Change settings for the <u>current</u> claim

1. Click the **Estimates** button, then click the **Estimate Settings** button.
2. You can then adjust the settings (region, tax, O&P, etc.) for your current claim. There is also an option to change the default item depreciation and apply it to all existing line items.

3. Insert Areas

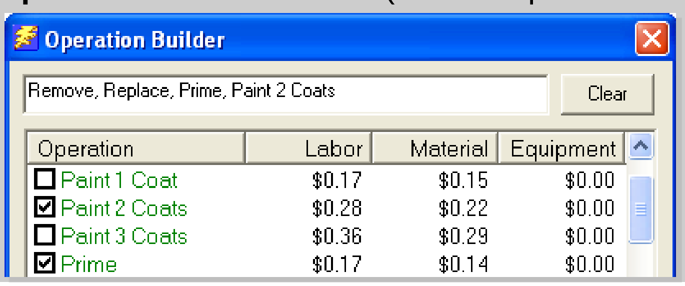


Allows you to quickly import areas from other claims

1. Click the **Insert Area** button at the top of the Areas Screen.
2. Navigate through your claims by clicking the **+** buttons, and select the area you wish to import.
3. Choose whether to include line items and how many copies of the area you want to insert.
4. Click the **Insert** button.
5. On the Areas Screen, highlight an area and click **Edit Area** to change the dimensions of your copied areas.

4. Operations

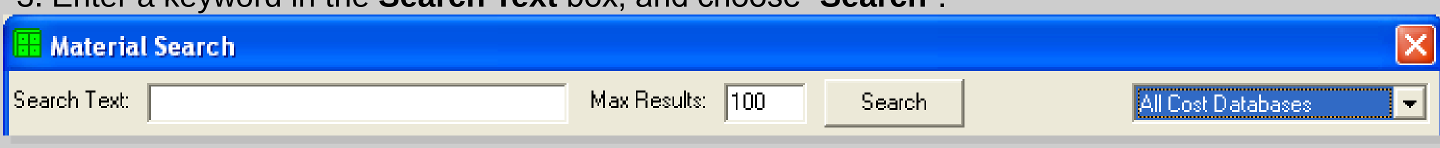
- **Green Operations** (in the drop-down menu) pull prices from the database.
- **Black Operations** require your custom prices.
- Multiple operations can be entered using the **Operation Builder** feature (in the drop-down menu)



5. Search All Cost Databases

Search for items to be included in your estimate

1. At the top of your Line Items Screen, click the **Search Cost** button.
2. Make sure that "**All Cost Databases**" is selected in the drop-down menu.
3. Enter a keyword in the **Search Text** box, and choose "**Search**".



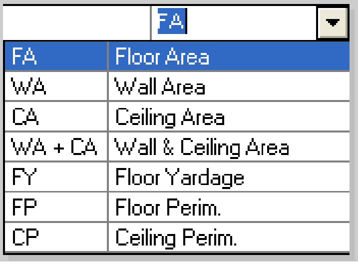
6. Quantity

- The **Quantity Box** uses Formulas that pull from your dimensions entered in the area setup.
- The Qty Box acts as a small **calculator**. You can add, subtract, multiply, and divide.
- If you forget which abbreviations you can use, click the drop-down arrow next to the Qty Box for a list.
- Example entries for Qty Box: **FA**

  WA+CA

  WA/2

  200



7. Copy Line Items

Copy line items and paste them into other areas

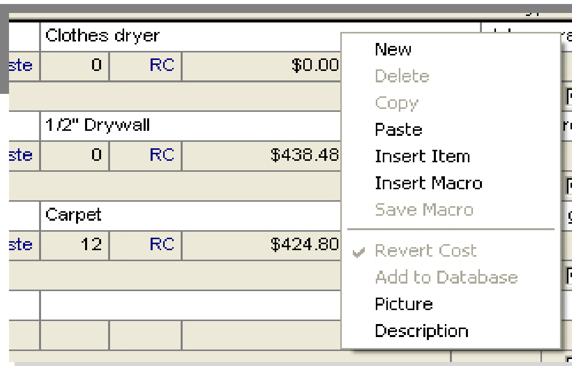
1. Select the line items to copy (see tip below).
2. Click the **Copy Items** button.
3. Open the area into which you wish to paste the line items, and click the **Paste Items** button.

Note: If the quantity box of the line item has WA, CA, etc., it will automatically update to the dimension of the new area.

Tip: <u>Selecting Multiple Line Items</u>

- Click the gray box to the left of the line item to select it.
- Hold the [CTRL] key to select multiple line items at once or the [SHIFT] key to select a range of line items.

8. Access Line Item Descriptions



Certain items in the cost database have pictures and additional description notes available

1. To determine if a line item entry has a description or picture, right-click the line item.
2. In the menu that appears, look to see if "**Description**" or "**Picture**" are available. If one or both are in gray, then they are not available for this item.

9. Custom Line Items

Creating a Custom Line Item consists of entering your own price

1. Leave the category blank, unless you wish to add it to the database.
2. Type your own Item, Type/Grade, Operation, Qty, Cost, etc.
3. Type in your unit of measurement in the Cost Breakdown at the bottom of the screen under the "Unit" column (EA, SF, LF, etc.)
4. Right-click the custom line item to add it to the cost database to use later.

10. Macros

The "Macros" feature allows you to insert preset groups of line items into areas

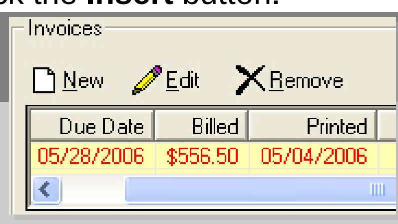
<u>Creating a Macro</u>

1. Go to the Line Items Screen.
2. Create the line item you wish to save, if not already created.
3. Select the line items you wish to save (*see tip in Copy Line Items section*).
4. Click the **Save Macro** button and enter a unique name.

<u>Inserting a Macro</u>

1. You can insert a macro on the Areas Screen or in the Line Items Screen.
2. Click the **Insert Macro** button.
3. Select the macro from the list.
4. Click the **Insert** button.

11. Create Multiple Invoices



Generate multiple invoices and payments for your claim files

1. Click on the **Invoice** button at the top of the screen to access the Invoice Management Screen.
2. To add a new invoice, click on the **New** button under the "**Invoices**" heading.
3. To add a payment, click on the **New** button under the "**Payments**" heading.
4. Partial or full payments can be applied to individual invoices from your invoice list.

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12. Import PDF Files

Import PDF files into *PowerClaim XML* to be included in your reports

1. Access the **Supporting Documents** section by clicking on the **Forms** button and selecting "**Supporting Documents**."
2. Click on the small arrow next to the **Add** button and select "**Add PDF**."

13. Separate Mat., Lab., Equip.

Print individual material, labor and equipment charges for each line item in your complete estimate report

On the reports screen, under the **Report Settings** tab, check the box next to "**Separate Material, Labor and Equip.**"

14. Depreciation by Trade

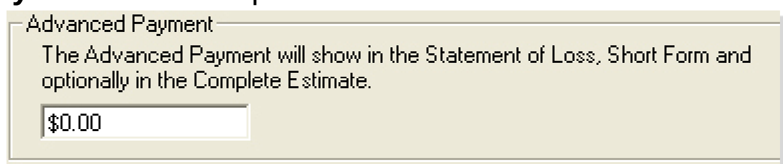
Set depreciation across a specific trade

1. From the **Forms** menu, select "**Global Trade Change.**"
2. A list of all trades used in the current claim will appear.
3. You can set a new depreciation value, and also adjust the labor, material, and equipment costs for the trade.

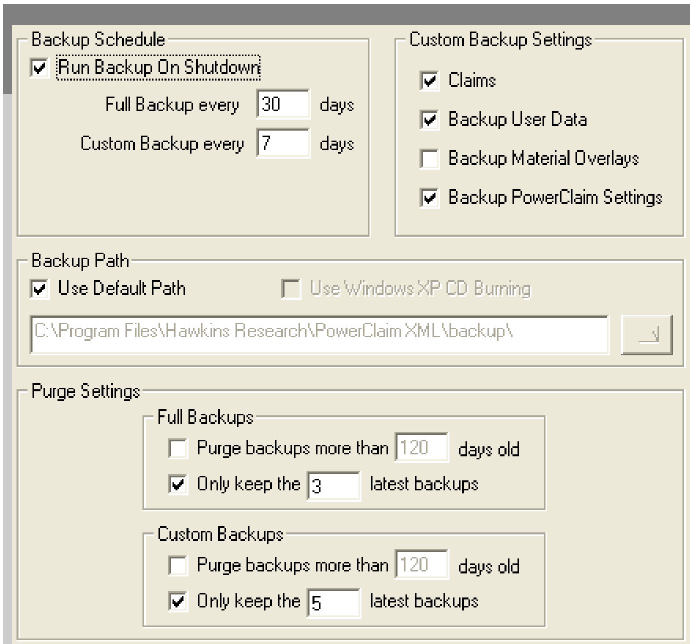
15. Denote Advanced Payment

Enter an advanced payment into your claim file

1. From the **Estimates** screen, click on the "**Estimate Settings**" button. At the bottom of the screen, enter the payment.
2. The advanced payment will show in the Statement of Loss and Short Form. You can also select to include it in the **Complete Estimate** by selecting "**Include Advanced Payment**" on the reports screen.



16. Backup Utility



Use the Backup Utility to customize how and when your information is backed up

1. Click on the **Tools** menu, and select **Preferences**. Click on "**Backup Options**."
2. Use the **Backup Schedule** to select when to run backups.
3. Set a **Custom Backup** by clicking on the appropriate checkboxes.
4. Select where your backups will be saved, including the option to **write directly to a CD**.
5. Use the **Purge Settings** to automatically delete older backup files to save space on your computer.

Training Resources

- Call **(800) 736-1246** to schedule a free walkthrough or for support questions
- Classes: Visit www.powerclaim.com and click on "Support" to sign up for a weekly PowerClaim class