

Master Builder

Before you setup Master Builder:

1. Verify that Master Builder and Master Builder API are installed.
2. Verify that Master Builder API is installed locally.
3. Verify the version of Master Builder and the version of Xactimate.

In Master Builder:

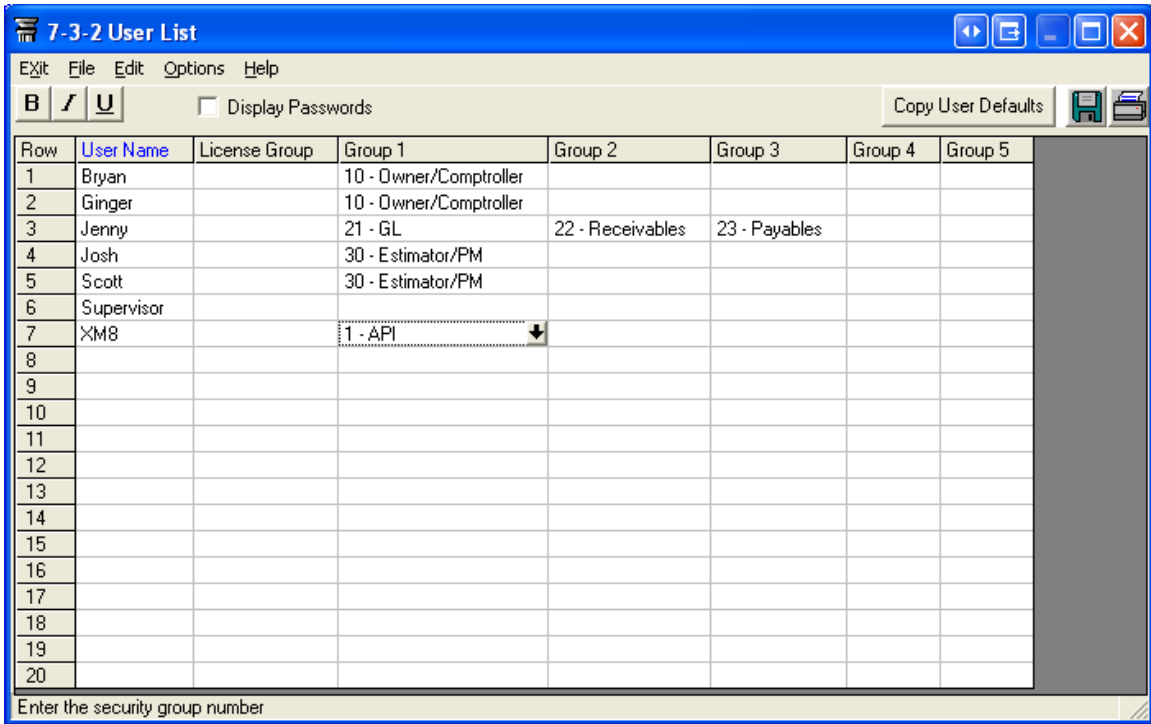
1. Log into Master Builder with supervisory rights.
By default, this is *Supervisor* with no password.

2. Open the company you want to export estimates into.
3. Double-click **Security Groups** (menu 7-3-1)
4. Type **api** as a new group name, give it a unique group number, and type Yes in the Save/delete field.

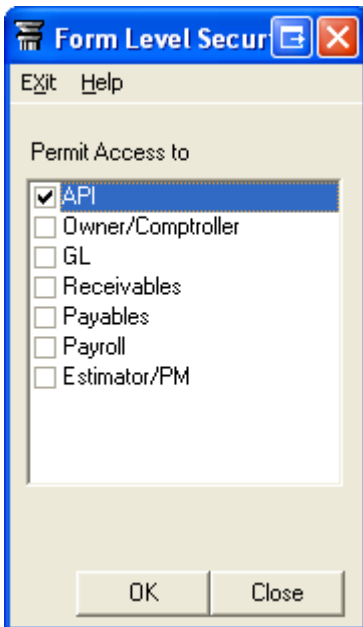
You can type Yes or No in the other fields.

Row	Group#	Group Name	Save/Delete	Void	Chg Period	Print Checks	Notes
1	1	API	Yes	Yes	Yes	Yes	
2	10	Owner/Comptroller	Yes	Yes	Yes	Yes	
3	21	GL	Yes	Yes	No	Yes	
4	22	Receivables	Yes	Yes	No	Yes	
5	23	Payables	Yes	Yes	No	Yes	
6	24	Payroll	Yes	Yes	No	Yes	
7	30	Estimator/PM	Yes	No	No	No	
8							
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5. Choose **Save** from the file menu to save your changes and close the Security Group window.
 6. Double-click **User List** (menu 7-3-2)
 7. Type **xm8** as the user name, and then select **api** as the Group 1 for super.
- You can use a name other than "xm8," that is simply the default name Xactware has selected.



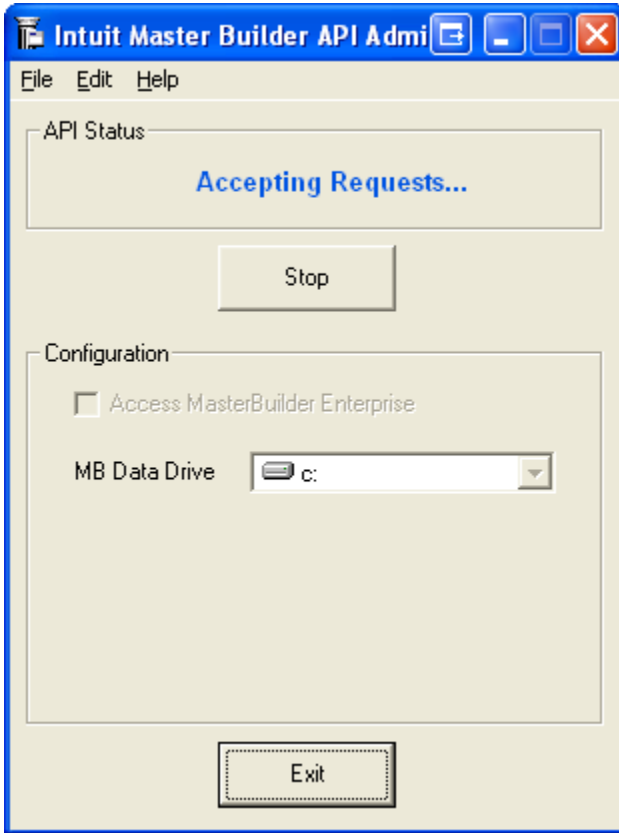
8. Choose **Save** from the file menu to save your changes and close the User List window.
9. Highlight **Budgets** (menu 6-2) and press **F7** on your keyboard.
10. Place a checkmark next to the **api** checkbox, then press **OK**.

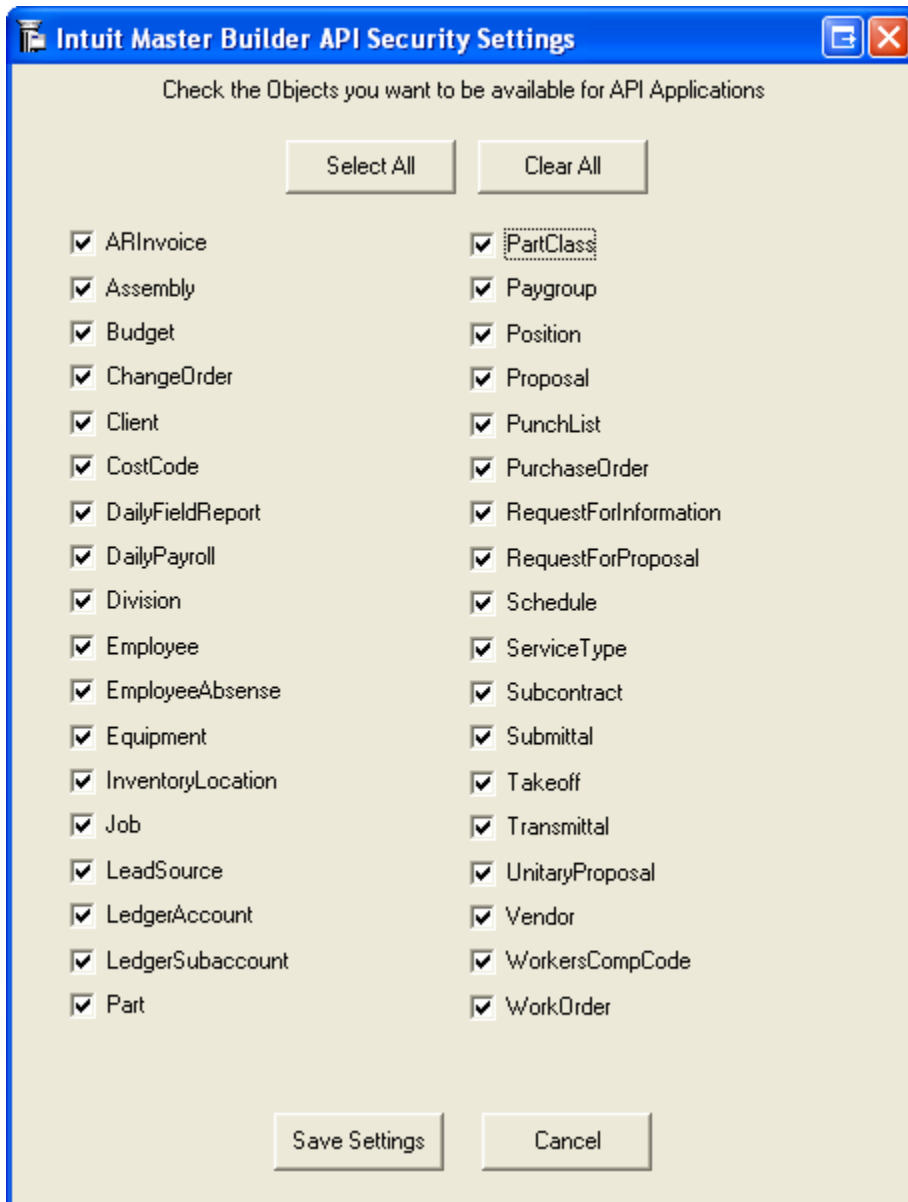


11. Highlight **Proposals** (menu 6-9) and press **F7** on your keyboard.
12. Place a checkmark next to the **api** checkbox, then press **OK**.
13. Highlight **Takeoffs** (menu 9-5) and press **F7** on your keyboard.
14. Place a checkmark next to the **api** checkbox, then press **OK**.
15. Choose **Exit** from the file menu, and click **Yes** to confirm that you want to Exit.

In Master Builder API:

1. Launch **Master Builder API**.
2. Choose **Security** from the Edit menu.
3. If Master Builder API informs you that it must be initialized, click **OK**.
4. Click **Select All**, and then click Save Settings to return to the Administration window.



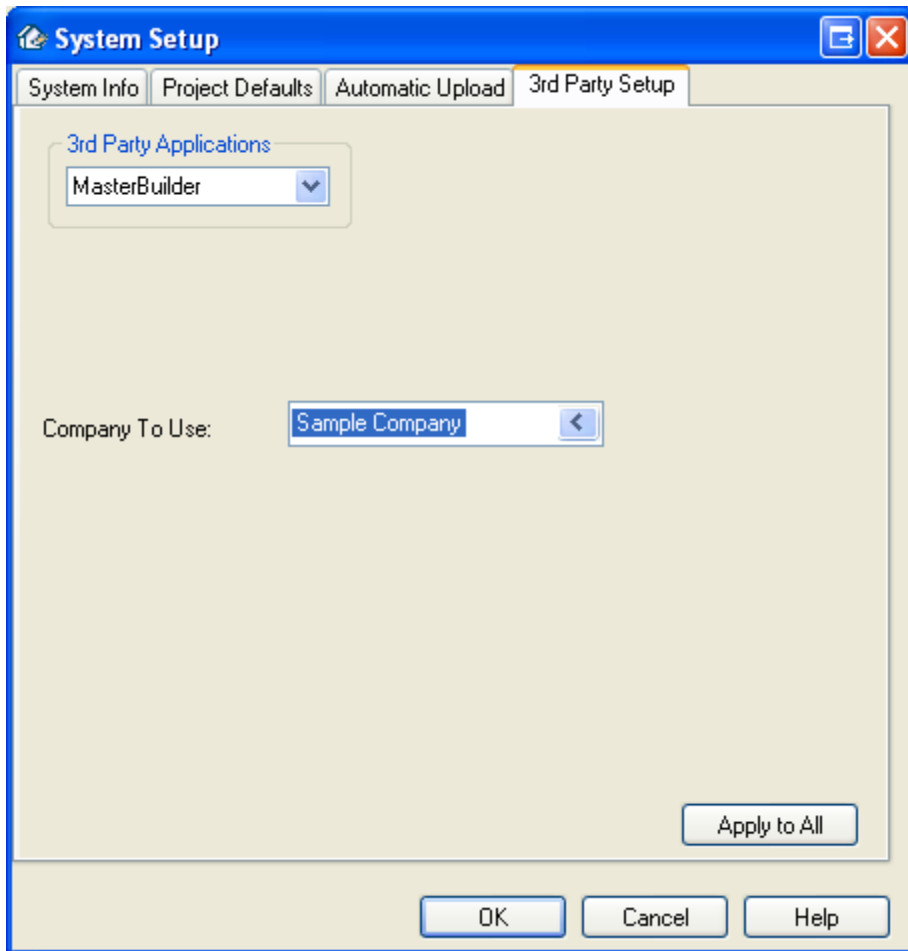


In Xactimate:

1. Launch Xactimate.
2. Choose System Setup from the Services menu.

Note: You can setup the 3rd party application under System Setup for the profile or under Preferences for a specific user. (I would recommend you use System Setup)

3. Click the **3rd Party setup** tab.
4. Choose **Master Builder** from the 3rd Party Applications drop-down list.



5. Click the **Company to Use SmartList** button.
 6. Choose the **Company Name**.
 7. Type **xm8** in the User Name field.
- If you entered a different name other than "xm8" in step 7 of "In Master Builder," type that name instead.
8. Click the Validate Button. (Master Builder API Needs to be running and accepting requests)
- The word "Validated!" should appear next to the User Name field.

Setup Link to Master Builder Company

Company Name:

User Name: Validated!

Password:

Summarize By Phase Summarize By Category

Taxable:

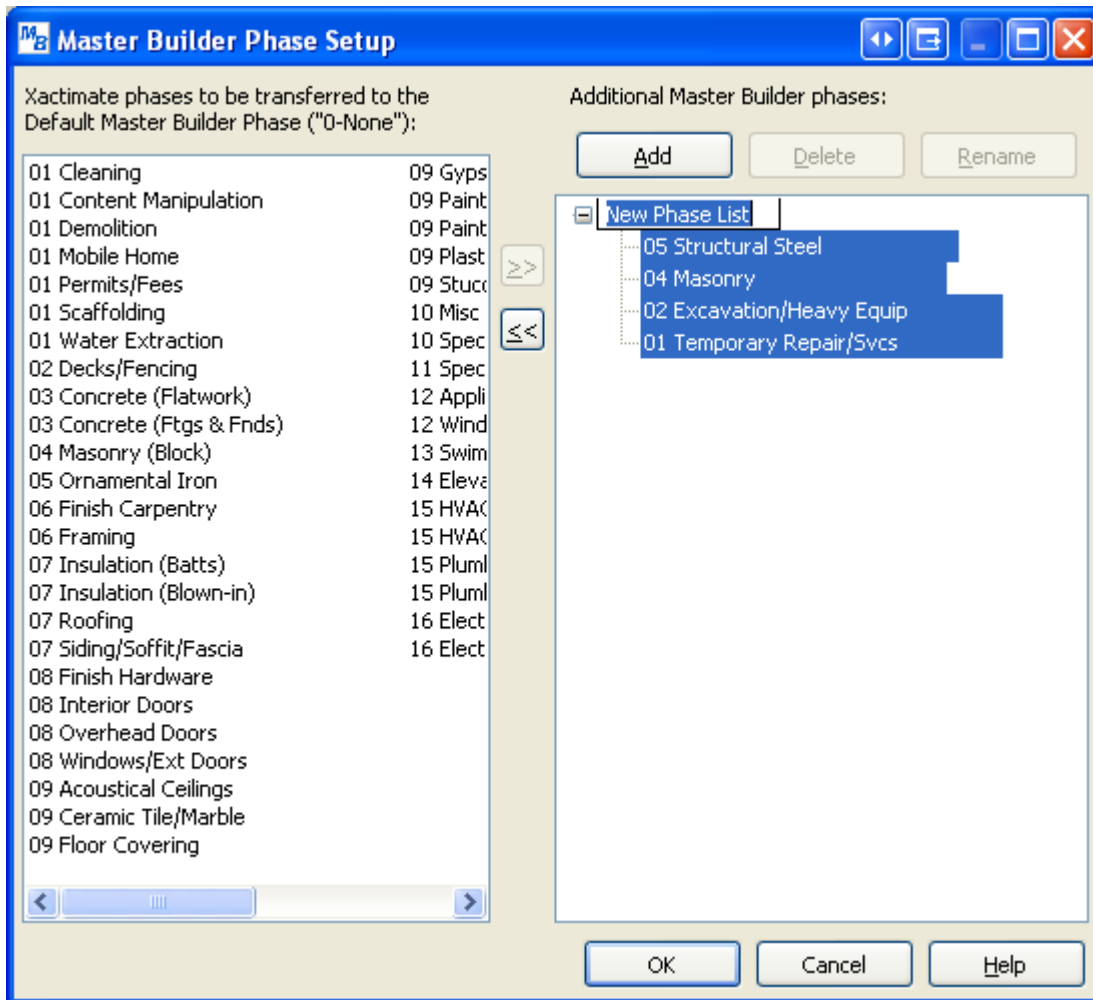
Exempt:

9. Click **Setup Cost Codes**.
10. Choose the Master Builder Cost Code that corresponds with the Xactimate Division.
11. Repeat step 10 for all phases.

Master Builder Cost Code Setup

	Xactimate Division	Master Builder Cost Code
▶ 09	Acoustical Ceilings	100300 - Full Service
12	Appliances	
	Base Service Charges	
09	Ceramic Tile/Marble	
01	Cleaning	
03	Concrete (Flatwork)	
03	Concrete (Ftgs & Fnds)	
01	Content Manipulation	
02	Decks/Fencing	
01	Demolition	
16	Electrical (Finish)	
16	Electrical (Rough-in)	
14	Elevators, Escalators	
02	Excavation/Heavy Equip	
06	Finish Carpentry	
08	Finish Hardware	
09	Floor Covering	
06	Framing	
09	Gypsum Board Systems	
15	HVAC (Finish)	

12. Click **OK** to return to the Master Builder Company Setup window.
13. Click **Setup Phases**.
14. Highlight all Xactimate phases you want added to a Master Builder phase, then type the name of the phase in the Master Builder Phase Name field. Click **OK**.



15. Click Add and repeat step 14 until all Xactimate phases have been added to a Master Builder phase.
16. Click **OK** at the Master Builder Phase window to return to the Master Builder Company Setup window.
17. In the Taxable and Exempt fields, click the drop-down list button to choose the appropriate tax district.
18. Click **OK** to close the Master Builder Company Setup window, and then click **OK** again to close the Master builder Companies SmartList.
19. Highlight the company you want estimates exported to and click **Apply to All**. Click **OK** to close the System Setup window.

To send estimates to Master Builder:

1. Make sure Master Builder API is running.
2. In Xactimate, open the estimate you want to transfer to Master Builder.
3. Go to Window and then **Master Builder Communication**.

The Transferring to [company] Company in Master Builder window appears. Any warning information will appear in the inside window.

The screenshot shows a software window titled "Transferring to Sample Company Company in Master Builder (By Phases)". The window is divided into three main sections. The top section, "Client / Job", contains radio buttons for "New Client" (selected) and "Existing Client", with text boxes for entering names. It also has radio buttons for "New Job" (selected) and "Existing Job", with a date field containing "2006-07-20-0630". The middle section, "Transfer Parameters", features dropdown menus for "Taxable" and "Exempt", both set to "None - 0", and buttons for "Modify Cost Codes" and "Modify Phases". The bottom section, "Important Transfer Information", is a large empty text area. At the very bottom of the window are buttons for "Takeoff", "Budget", "Proposal", "Close", and "Help".

4. Select whether you want the name of the Xactimate customer to be assigned to an existing client or exported as a new client. Enter or select the client's name.
5. Select whether or not you want the name of the Xactimate estimate to be assigned to an existing job or exported as a new job. Enter or select the job's name.
6. If the taxable or exempt tax districts, cost codes or phases are different from the default that was set up earlier, you can change these from this window.
7. Click the **Takeoff** button.

Xactimate will send the estimate information to Master Builder, and report any findings in the inner window.

If you prefer to send only budget and proposal information to Master builder, you can click the **Budget** or **Proposal** buttons instead of Takeoff.

8. Click **OK**.

In addition to sending the entire estimate information, you can choose to send a budget or proposal to Master Builder by clicking either the Budget or Proposal buttons. You can see these items in Master Builder menus 6-2 and 6-9.

9. Click **Close**.

Notes:

Takeoff –

Budget – Represents a summary of the hard costs detailed in a takeoff, and provides the basis for all budgeted versus actual cost, hour, or unit comparisons. In addition, you can use the budget as the basis for the proposal you provide to the client.

Proposal – Is a breakdown of the contracted amount by cost code or bid item. Master Builder provides several ways to create a proposal: you can export the data from a takeoff, import a budget, import a file, or create a proposal manually. After the proposal is completed, you can set the original proposal. After negotiating the price with your client, you can edit the current proposal and compare it with the original.