

### INTRODUCTION

This document contains the following sections to help you install and start using Xactimate v.25.5.

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## XACTIMATE v.25.5 SYSTEM REQUIREMENTS

Before installing Xactimate v.25.5 on your computer, it is critical that your computer meets the minimum system requirements for Xactimate.

- Xactimate 25.5 runs on the following operating systems:
  - Windows XP (Service Pack 2 or 3)
  - Windows Vista
  - XP Media Center 2005 Edition
  - Vista 64-bit Ultimate
  - Vista 64-bit Business

Xactimate does not support Windows 95, 98, ME, NT, or 2000.

- *Processor Speed*: at least 1 GHz processor (1.5 GHz or better is recommended).
- *RAM*: at least 512 MB of RAM (1 GB or better is recommended).
- *Hard Drive Space*: at least 1.5 GB of free hard drive space available. If you are installing any Dual Licenses (Xactimate v.24.13 or Xactimate v.25.0), you need an additional 1.5 GB of hard drive space for each license.
- *Monitor Resolution*: 1024x768 or higher.
- *Internet Access* is required to set up and operate Xactimate.

A DVD-ROM drive is required to set up Xactimate from CD or DVD.

Xactimate can be used on any Tablet PC that supports these system requirements.

Additional requirements have been added to support Windows Vista. Other changes include Windows 2000, which is no longer supported, and the RAM requirement, which has increased from 256 MB to 512 MB for computers using Windows XP.

**Warning!** *If you have a previous version of Xactimate already installed on your computer, it is critical that you back up your data using Data Transfer before updating to Xactimate v.25.5 (if you receive an error message during the data transfer process, resolve that problem before updating). The installation of Xactimate v.25.5 will overwrite Xactimate v.24 on the same computer. Any data that is not backed up beforehand will not be usable in Xactimate v.24 after you have upgraded to Xactimate v.25. After updating to Xactimate v.25, you may need to manually retrieve some assignments from your Xactimate v.24 backup.*

## XACTIMATE INSTALLATION

This chapter walks you through the installation of Xactimate 25.5. It provides you with step-by-step instructions for installing Xactimate on stand-alone computers. By following the instructions in this chapter, you should have Xactimate installed and ready to use in no time at all.

**Warning!** *Some profile owners allow you to use only approved versions of Xactimate; any of your data that is related to these profiles will only be viewable in the approved version. If you require multiple versions of Xactimate to run all your profiles, you may want to consider purchasing a Dual License to make sure all your projects are still accessible. You can purchase the Dual License by calling 1-800-424-9228.*

For network installations, see [www.xactware.com/25](http://www.xactware.com/25). The following instructions are for stand-alone computers (computers that do not share data with other computers) only.

Before installing Xactimate on your computer, it is critical that your computer meets the minimum system requirements for Xactimate (see page 1).

### UPDATING XACTIMATE FROM V.24 TO V.25.5

1. Make sure you have an active connection to the Internet. Close all open applications.
2. Insert the Xactimate DVD into your computer.

The Installation procedure should begin automatically. If the Xactimate setup procedure does not begin immediately, follow these steps:

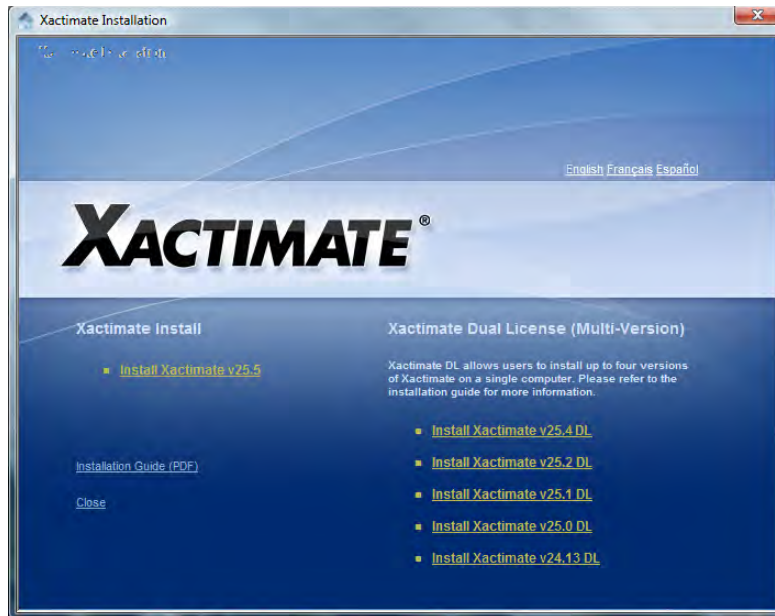
For Windows XP,

- a. Click your Windows **Start** button.
- b. Click **Run**.
- c. Type **D:\setup.hta** in the *Open* field.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
- d. Click **OK**.

For Windows Vista,

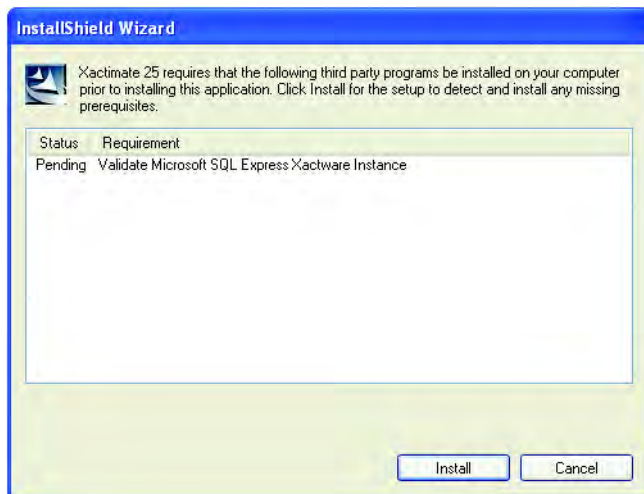
- a. Click your Windows **Start** button.
- b. In the *Start Search* field, type **D:\setup.hta**.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
- c. Press **Enter** on your keyboard.

The *Xactimate Product Install Launcher* appears.



**3. Click *Install Xactimate v25.5*.**

The Installation setup procedure begins. An InstallShield Wizard window informs you that Xactimate requires SQL Server Express to run correctly.



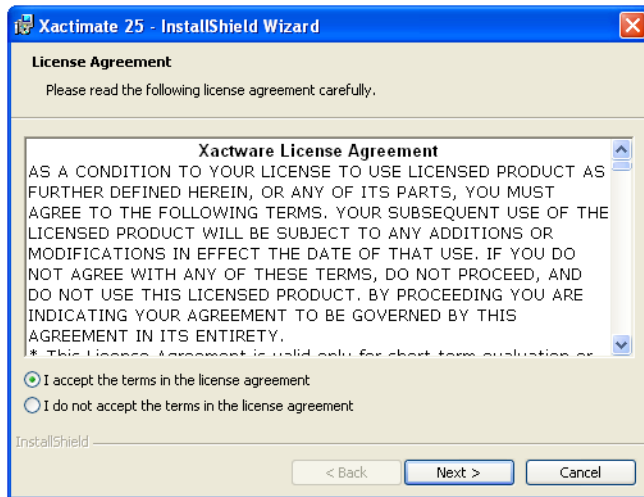
**Note:** *This is a Microsoft program that is required to run Xactimate. Even if it is already installed on your computer, this window appears so Xactimate can validate the existence of the correct version of the program and then install any required programs that are needed.*

**4. Click the *Install* button to begin installation.**

The *New for Xactimate 25* window informs you of the dual licensing program.

**5. Click OK or Yes.**

The *License Agreement* window appears.

**6. Read the text contained in this window before proceeding to the next step.****7. After reading the license agreement, click the I accept the terms in the license agreement radio button, then click Next.**

**Note:** From this point on, you can click the Back button at any time to return to the previous window, click Next to accept the current selections and continue, or click Cancel to stop the install process.

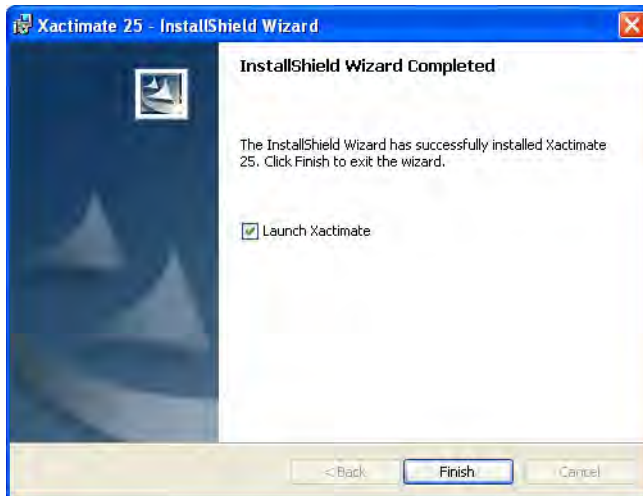
The *Custom Setup* window appears. We recommend that you accept the defaults in this window as they appear.



**Note:** If you are comfortable working with Microsoft Windows folders and data paths, you can click Change if you need to change the path where Xactimate will be installed.

8. Click **Next** to accept the default data path and to keep the desktop shortcut and all users options checked.

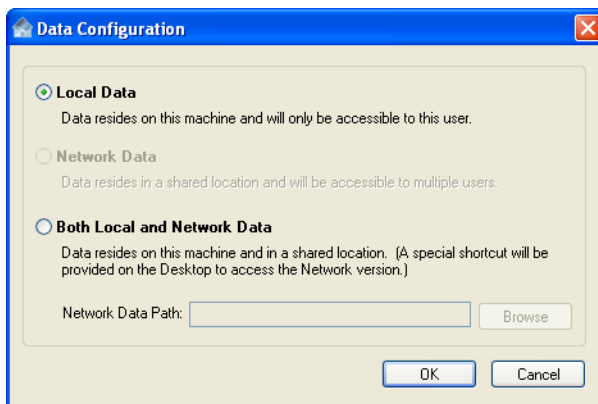
The installation process begins. You will see a progress bar that shows you the progress of the install. This will take several minutes. When the installation is finished, the *InstallShield Wizard Completed* window appears. By default, the *Launch Xactimate* checkbox is selected.



The installation is complete and you now need to configure Xactimate v.25.5.

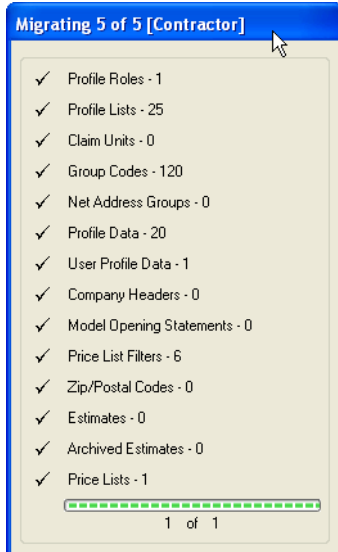
9. Click **Finish**.

The *Data Configuration* window appears.



10. Click **OK** on the *Data Configuration* window to accept the default Local Data option.

Xactimate copies files such as projects and price lists to new version and process SmartObjects. This may take a few minutes.

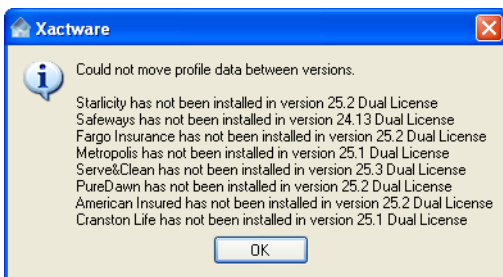


You may receive warning that certain profiles will not be available until you install the proper version



11. Click **OK**.

You may receive notice that Xactimate could not move profile data between versions.



**12. Click OK.**

The *Xactimate Login* window appears.



Congratulations, You have now successfully installed Xactimate v.25.5. You can log in using the instructions given in “Login” in the *Xactimate User’s Guide*, which you can find at [https://eservice.xactware.com/esc/pdf/xm825\\_users\\_guide.pdf](https://eservice.xactware.com/esc/pdf/xm825_users_guide.pdf).

You’re now ready to begin using Xactimate.

**INSTALLING XACTIMATE—NEW INSTALL**

1. Make sure you have an active connection to the Internet. Close all open applications.
2. Insert the Xactimate DVD into your computer.

The Installation procedure should begin automatically. If the Xactimate setup procedure does not begin immediately, follow these steps:

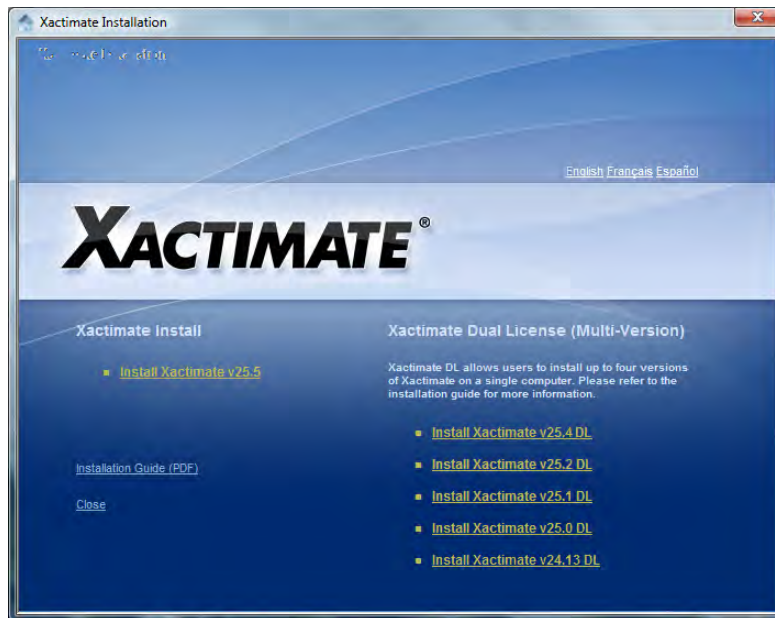
For Windows XP,

- a. Click your Windows **Start** button.
- b. Click **Run**.
- c. Type **D:\setup.hta** in the *Open* field.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
- d. Click **OK**.

For Windows Vista,

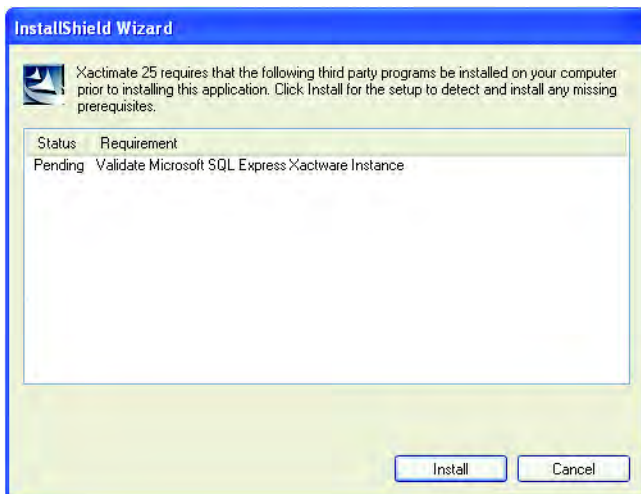
- a. Click your Windows **Start** button.
- b. In the *Start Search* field, type **D:\setup.hta**.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
- c. Press **Enter** on your keyboard.

The *Xactimate Product Install Launcher* appears.



### 3. Click **Install Xactimate v25.5**.

The Installation setup procedure begins. An InstallShield Wizard window informs you that Xactimate requires SQL Server Express to run correctly.



**Note:** This is a Microsoft program that is required to run Xactimate. Even if it is already installed on your computer, this window appears so Xactimate can validate the existence of the correct version of the program and then install any required programs that are needed.

#### 4. Click the **Install** button.

The *License Agreement* window appears.



#### 5. Read the text contained in this window before proceeding to the next step.

#### 6. After reading the license agreement, click the **I accept the terms in the license agreement** radio button, then click **Next**.

**Note:** From this point on, you can click the *Back* button at any time to return to the previous window, click *Next* to accept the current selections and continue, or click *Cancel* to stop the install process.

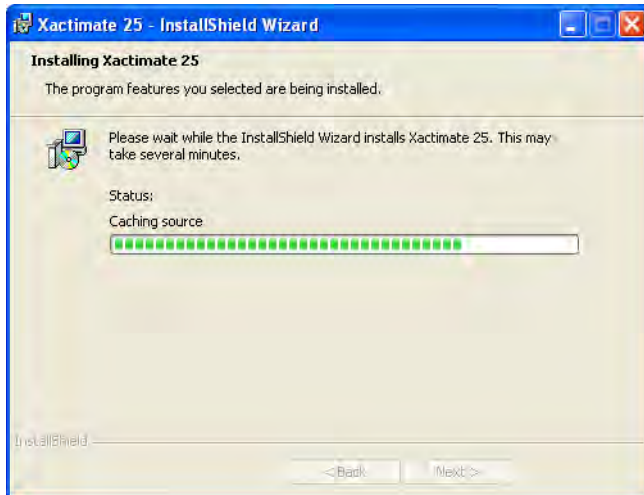
The *Custom Setup* window appears. We recommend that you accept the defaults in this window as they appear.



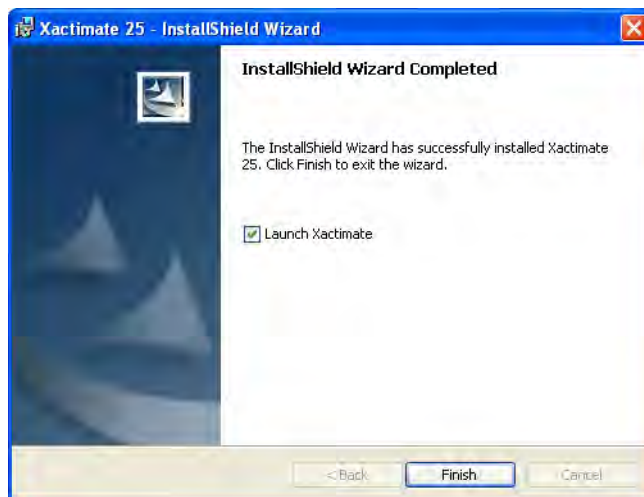
**Note:** If you are comfortable working with Microsoft Windows folders and data paths, you can click *Change* if you need to change the path where Xactimate will be installed.

7. Click **Next** to accept the default data path and to keep the desktop shortcut and all users options checked.

The installation process begins. You will see a progress bar that shows you the progress of the install. This will take several minutes.



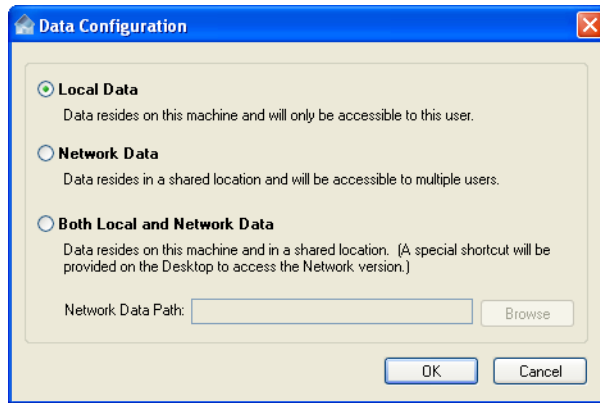
When the installation is finished, the *InstallShield Wizard Completed* window appears. By default, the *Launch Xactimate* checkbox is selected.



The installation is complete and you now need to configure Xactimate v.25.5.

**8. Click Finish.**

The *Data Configuration* window appears.

**9. Click OK** on the *Data Configuration* window to accept the default Local Data option.

A window asks if you want to import data from a previous version of Xactimate.

**Note:** *The only time you'll need to click yes to this question is if you've already uninstalled Xactimate v.24 (or v.24i) and the uninstall failed and you want to convert your Xactimate v.24 data to Xactimate v.25.*

**10. Click No** unless you meet the conditions noted above.

If you do have data from a copy of Xactimate v.24 that has been uninstalled from this computer,

**a. Click Yes.**

The Specify Directory window opens.

**b. Enter the data path where this backed-up data is located.**

You can enter this data directly or click the browse button to locate the folder it is stored in.

**c. Click OK.**

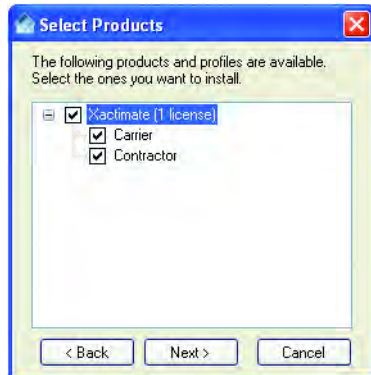
The *Xactimate Configuration* window appears, letting you know the progress of the configuration during setup. This process may take several minutes to run; do not cancel the installation while the configuration is running.

The *Enter Key Code* window appears.

11. Type the 20-character key code found on the back of your product packaging, then click **Next**.

**Note:** Xactware does not use the letter O for its key codes; always enter the number 0 if you aren't sure which character it is.

The *Select Products* window appears.



12. Mark the profiles you want installed on your computer, then click Next.

Once configuration is complete, the Xactimate Login window appears.



Congratulations. You have now successfully installed Xactimate v.25.5. You can log in using the instructions given in “Login” in the Xactimate User’s Guide, which you can find at [https://eservice.xactware.com/esc/pdf/xm825\\_users\\_guide.pdf](https://eservice.xactware.com/esc/pdf/xm825_users_guide.pdf).

You’re now ready to begin using Xactimate.

## UPGRADING TO XACTIMATE V.25.5 FROM AN EARLIER VERSION OF XACTIMATE V.25

1. Make sure you have an active connection to the Internet. Close all open applications.
2. Insert the Xactimate DVD into your computer.

The Installation procedure should begin automatically. If the Xactimate setup procedure does not begin immediately, follow these steps:

For Windows XP,

- a. Click your Windows **Start** button.
- b. Click **Run**.
- c. Type **D:\setup.hta** in the *Open* field.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
- d. Click **OK**.

For Windows Vista,

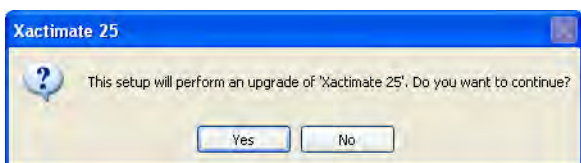
- a. Click your Windows **Start** button.
- b. In the *Start Search* field, type **D:\setup.hta**.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
- c. Press **Enter** on your keyboard.

The *Xactimate Product Install Launcher* appears.



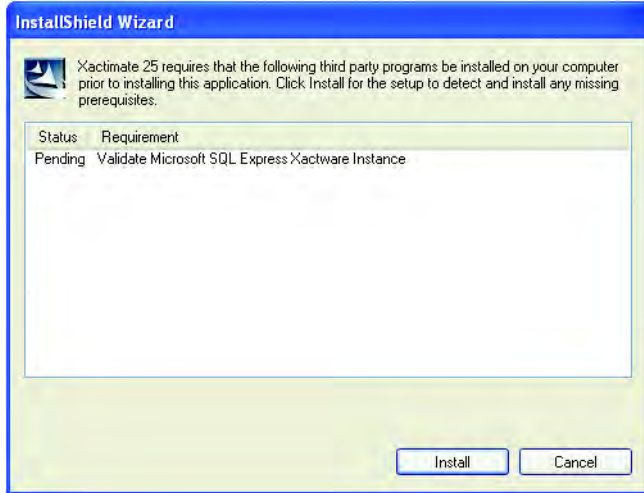
3. Click **Install Xactimate v25.5**.

A window asks if you want to upgrade Xactimate v.25.



4. Click **Yes**.

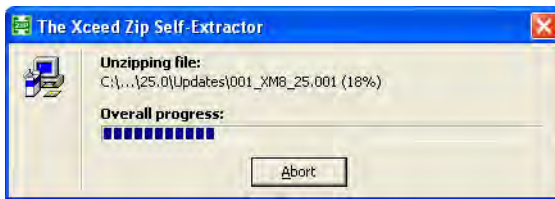
The Installation setup procedure begins. An InstallShield Wizard window informs you that Xactimate requires SQL Server Express to run correctly.



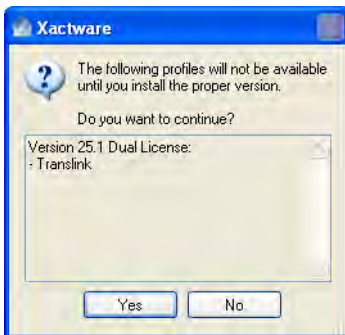
**Note:** This is a Microsoft program that is required to run Xactimate. Even if it is already installed on your computer, this window appears so Xactimate can validate the existence of the correct version of the program and then install any required programs that are needed.

5. Click the **Install** button.

The Xceed Zip Self-Extractor appears, extracting the upgrade.

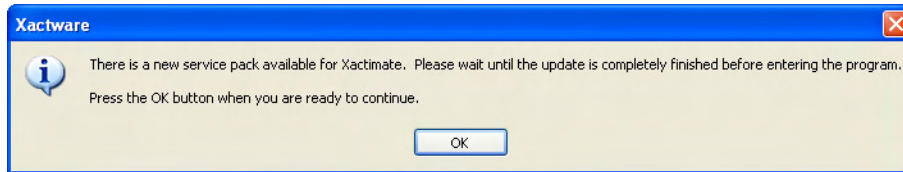


If you have any versions that require specific updates, the *Proper Version* window appears. This window informs you of any profiles you might have problems with if you do not use the dual license.

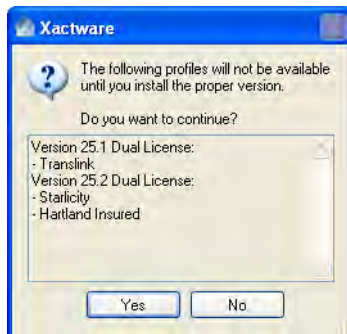


**6. Click Yes to continue.**

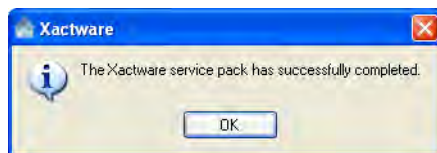
After a minute or so of backing up files, a window informs you that a new service pack is available.

**7. Click OK.**

The installation process configures any service packs that have come out since you last installed/updated Xactimate.

**8. Repeat steps 6–7 for each service pack you are upgrading.**

The installation process informs you when the service pack has been successfully completed.

**9. Click OK.**

You are now ready to run Xactimate 25.5.

## XACTIMATE DUAL LICENSE INSTALLATION

Because it is common practice for service providers to work for multiple carrier companies at the same time, multiple versions of Xactimate can now be installed on the same computer. All dual license installs must be installed after the current release, Xactimate v.25.5. Each version of Xactimate will have its own icon and database, and will appear in the Add or Remove Programs section of your operating system (each version can be installed and uninstalled separately). If you uninstall v.25.5 before uninstalling the dual license, the dual license program will be inaccessible. We recommend you make a backup of your dual license data before uninstalling the standard release.

At this time, you can install dual license versions for Xactimate v.24.13, Xactimate v.25, Xactimate v.25.1, Xactimate v.25.2, and Xactimate v.25.4.

### XACTIMATE DUAL LICENSE INSTALL

Before installing the dual license on your computer, you must also have previously installed Xactimate v.25.5 on your computer.

***Note:** There are some known compatibility issues between Xactimate v.24.13DL and Windows Vista. For a list of these issues and the known work around, please contact our support team through the eService Center.*

***Warning!** When installing Xactimate v.24.13DL on Windows Vista, do not allow the installation to auto run; you must always run the installation program as an administrator.*

1. Make sure you have an active connection to the Internet. Close all open applications.
2. Insert the Xactimate DVD into your computer.

The Installation procedure should begin automatically. If the Xactimate setup procedure does not begin immediately, follow these steps:

For Windows XP,

- a. Click your Windows **Start** button.
- b. Click **Run**.
- c. Type **D:\setup.hta** in the *Open* field.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.
- d. Click **OK**.

For Windows Vista,

- a. Click your Windows **Start** button.
- b. In the *Start Search* field, type **D:\setup.hta**.  
If your DVD-ROM drive is not D, type the letter for your DVD drive instead.

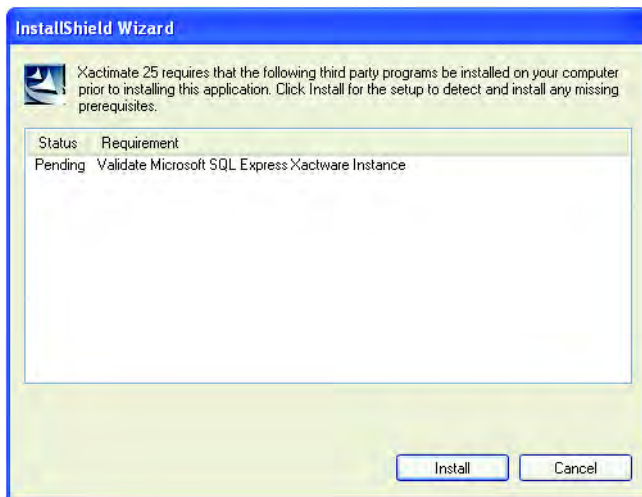
c. Press **Enter** on your keyboard.

The *Xactimate Product Install Launcher* appears.



3. Click **Install Xactimate v24.13DL** (or whichever version you are installing).

The installation setup procedure begins. An InstallShield Wizard window informs you that Xactimate requires SQL Server Express to run correctly.



**Note:** This is a Microsoft program that is required to run Xactimate. Even if it is already installed on your computer, this window appears so Xactimate can validate the existence of the correct version of the program and then install any required programs that are needed.

4. Click the **Install** button to begin installation.

The *License Agreement* window appears.

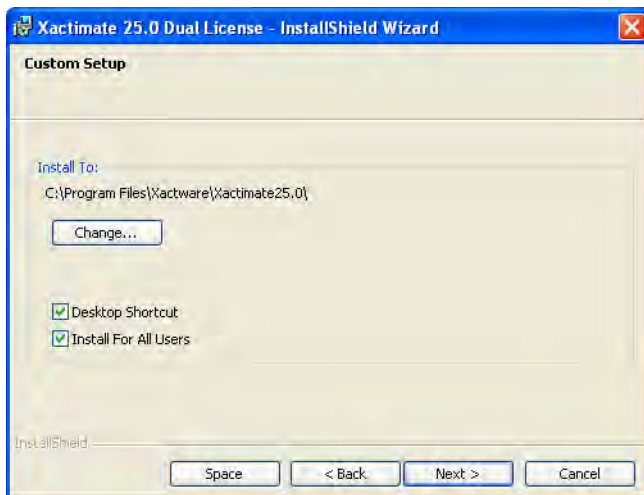


5. Read the text contained in this window before proceeding to the next step.

6. After reading the license agreement, click the **I accept the terms in the license agreement** radio button, then click **Next**.

*Note: From this point on, you can click the Back button at any time to return to the previous window, click Next to accept the current selections and continue, or click Cancel to stop the install process.*

The *Custom Setup* window appears. We recommend that you accept the defaults in this window as they appear.



*Note: If you are comfortable working with Microsoft Windows folders and data paths, you can click Change if you need to change the path where Xactimate will be installed.*

7. Click **Next** to accept the default data path.

The install process begins. A progress bar shows you the installation's progress; this may take a few minutes. When this process is finished, the InstallShield Wizard Completed window appears.

**8. Click Finish.**

This portion of the installation is complete.

**9. From your Windows desktop, do the following:**

If you are running Windows XP,

- a. Double-click the **Xactimate v.24.13 Dual License** icon (or the icon for whichever version you installed)

If you are running Windows Vista,

- a. Double-click the **Xactimate v.24.13 Dual License** icon (or the icon for whichever version you installed).

The *Account Control* window appears.

- b. Click the **Allow** button to configure the program as an administrator.

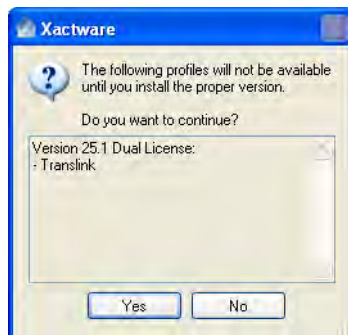
The *Xactimate Configuration* window appears, letting you know the progress of the configuration during setup. This process may take several minutes to run; do not cancel the installation while the configuration is running.

The *Select Products* window appears.

**10. Mark the profiles you want installed on your computer, then click Next.**

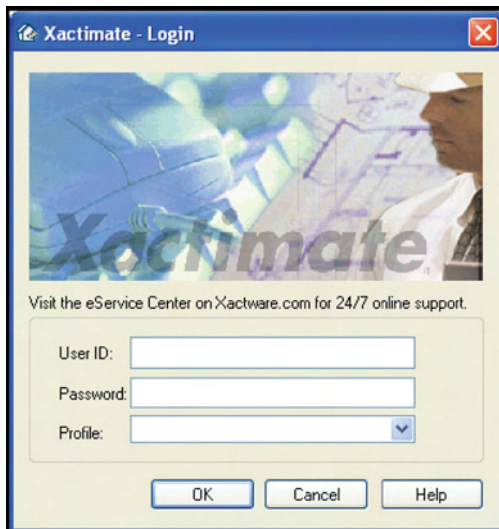
A progress bar displays the progress of the configuration, along with other windows. It may take a few minutes for these processes to be completed.

If you have any versions that require specific updates, the *Proper Version* window appears. This window informs you of any profiles you might have problems with if you do not use the dual license.

**11. Click Yes or OK to continue.**

12. When instructed that the operation was successfully completed, click **OK**.

The *Xactimate Login* window appears.



Congratulations. You have now successfully installed your dual license Xactimate.

Further instructions on how to log in and use the program can be found in the *Xactimate 25 User's Guide* at [https://eservice.xactware.com/esc/pdf/xm825\\_users\\_guide.pdf](https://eservice.xactware.com/esc/pdf/xm825_users_guide.pdf).

## REGISTERING XACTIMATE

A critical part of getting the full use of Xactimate is registering with Xactware. This allows Xactware and other companies running Xactimate to communicate with you and send you assignments, price lists, upgrades, and other SmartObjects.

### TO REGISTER WITH XACTWARE FOR THE FIRST TIME

If you have already registered a previous version of Xactimate and want to keep your same XactNet address, then you will need to re-register your XactNet address (see To re-register with Xactware, below these steps).

1. From the Control Center main window, click **Register with XactNet** near the upper right corner.

The *Pre-Registration* window appears.

2. Click the **I don't have an XactNet address and need a new one** radio button, then click **OK**.

The *License Agreement* window appears.

3. Click the *Agreement Link* button.

Your default web browser opens, and the *XactNet Subscription and Software Usage Agreement* appears.

4. Read through this agreement, then close your web browser, return to the *License Agreement* window, and click **Accept**.

The *Online Registration* window appears.

5. Type your company name, address, and phone information in the proper fields.

6. Type your email address twice in the fields provided.

7. Type a contact name and your user name in the fields provided.

8. In the *XactNet Address* field, enter an XactNet address that you create.

You can create this XactNet address using COMPANYNAME.CITY or COMPANYNAME.YOURNAME as the format for the address.

9. Click **OK**.

Xactimate lets you know you've registered successfully.

**Note:** *In the unlikely event that the XactNet address you entered is already registered to another user, an error message appears, informing you that you have selected an invalid XactNet address. If this occurs, enter a different XactNet address (an abbreviation of your company name, for example) and click OK.*

### TO RE-REGISTER WITH XACTWARE

1. From the Control Center main window, click **Register with XactNet** near the upper right corner.

The *Pre-Registration* window appears.

2. Click **I already have an XactNet address and want to recover it** radio button.

The *Existing Registration Options* portion of the window becomes active.

3. Click the **Enter e-mail address associated with previous XactNet Address** radio button.

4. Type the email address that was used previously to register with Xactware, then click **OK**.

5. Click **OK** at the Xactware window to confirm that you received its message.

Within a few minutes, Xactware will send a message to the email address you entered. This email message will contain a security code.

6. Highlight and copy (CTRL-C) this code from your email program, then return to Xactimate.

7. Click **Register with XactNet** again.

The *Pre-Registration* window appears again.

8. Click **I already have an XactNet address and want to recover it**, then click **Enter previously sent security code** to complete registration.

9. Type the email address you entered in the *Pre-Registration* window, then type (or paste) the security code into the appropriate field.

10. Click **OK**.

Xactware displays a *Registration was successful* message.

11. Click **OK**.

You are now registered with XactNet.

### CONNECTING TO XACTANALYSIS

Whenever you want to download messages from another Xactimate user, receive an assignment from XactAnalysis, or send anything back to XactAnalysis, you must connect to XactAnalysis.

Connecting to XactAnalysis is a simple process that consists of XactAnalysis delivering the SmartObjects (data files) in your Outbox, and downloading SmartObjects that have been sent to you and placing them in your Inbox. This process often takes only a minute (although it might take longer if you are uploading/downloading assignments, price lists, or other large SmartObjects).

To connect to XactAnalysis,

1. In the Control Center, click the **Control Center** tab.

The *Control Center Dashboard* page appears.

2. Click **Connect** near the upper-right corner.

The *XactNet Connection* window appears. You will see the status on this window change from *Not Connected* to *Handshaking* to *Connected*, then back to *Not Connected*.

3. Click **Done**.

The *XactNet Connection* window closes, and the SmartObjects that were downloaded can now be found in your *XactNet Communications Inbox*. Any items that were in your *XactNet Communications Outbox* were sent to their proper destinations.