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WEEK 5  
Saturday  
March 23,  
2024

10<sup>TH</sup> GENERATION  
CREATING SUSTAINABLE  
NEIGHBORHOOD  
DEVELOPERS'  
PROGRAM: *Virtual*

- 9:00 AM: **Welcome!!**  
Dr. Donald Andrews- Dean, College of  
Business,  
Southern University and A&M College
- 9:05 AM: **Path Forward:**  
Eric L. Porter  
Co-Creator CSND/ComNet LLC
- 9:10 AM: **Curriculum Direction:**  
Dr. Sung No,  
Co-Director, SU EDA University Center
- 9:15 AM: **Essentials for Small Business**  
Ada Womack-Bell, SBDC  
A&G Consulting
- 9:55 AM: **Property Marketing/Property Management**  
Tonia Askins International, LLC
- 10:30 AM: **Break**
- 10:35 AM: **Neighborhood Project Development**  
Clem Lefleur, President, Clem JR Development
- 11:15 AM: **Solar - Solutions**  
Michael Roberts & Douglas Melancon  
PosiGen Solar
- 11: 45 AM: **Xactimate – Awareness**  
Eric L. Porter, ComNet, LLC
- 12:40 PM: **Elevator Pitch**  
Spring 2024 CSND Students
- 1:00 PM **Closing**



# CREATING NEIGHBORHOOD DEVELOPERS

*“Licensing, Certifications, Business Startups”*

Louisiana Small Business Development Center  
Southern University and A & M College

**Presented by:**

**Ada Womack-Bell, MBA  
Director**



# About Us!

The Louisiana Small Business Development Center (LSBDC) network, hosted by Louisiana State University, is a member of the National Association of Small Business Development Centers and funded in part through a cooperative agreement with the U.S. Small Business Administration, Louisiana Economic Development and participating universities and community colleges.

## **Our Mission**

Our mission is to facilitate the formation and growth of small businesses through individual one-on-one consulting services, entrepreneurial workshops, training programs and business resources. With a network of 7 regional locations across all 64 parishes, professional LSBDC consultants turn simple ideas into profitable business ventures.

# Products & Services

- **Consulting**

We offer high-quality, confidential consulting to existing and new small business owners at no charge. LSBDC business consultants will help you evaluate your business idea, prepare marketing strategies, determine financing needs, develop a loan proposal, conduct industry and market research, and create an actionable business plan.

- **Workshops & Seminars**

We provide affordable training, in addition to affordable training and high-quality market research. We specialize in growth acceleration, international trade, government contracting, and emergency preparedness and more.

- **Business Information & Resources**

With our no-cost business information services, the LSBDC can help you gather industry or market statistics for your business or marketing plan, research specific market or industry trends, and identify competitors, suppliers or potential customers.

# Components of Developers

- Project Management
  - Timelines, structure, multitask
- Financing Projects
  - Traditional and Non Traditional Funding
  - Grants (Municipalities)
  - Investors
  - Other Sources
- Construction Management
  - Licenses
  - Processes

# **Louisiana State Licensing Board for Contractors**

**The Louisiana State Licensing Board for Contractors (LSLBC)** was created in 1956 by Act 233 and is governed under Title 37:2150-2192 of the Louisiana Revised Statutes, Chapter 24.

The LSLBC mission is to protect the general public and the integrity of the construction industry.

Through the Commercial Board and its Residential Subcommittee, the LSLBC regulates commercial, industrial, and residential construction projects.



# Unlicensed Contractors...

- Cut corners
- Display no skills, knowledge, or competency
- Are not insured or bonded to perform construction work
- Offer cheaper services to the consumer
- “Sounds too good to be true and you get what you pay for”



# Licensed Contractors...

- Do it the right way!
- Take pride in their work
- Demonstrate competency and knowledge of construction industry standards
- Doing business compliant and legal by the laws of Louisiana and the Federal Government





# LSLBC License Types

- Commercial License
- Residential License
- Mold Remediation License
- Home Improvement Registration

# Commercial License

## What does Commercial License cover?

- Commercial projects with a value of \$50,000 or more
- Subcontractor/Specialty Trades for commercial projects with a value of \$50,000 or more including labor and materials.
- Exceptions:
  - Electrical/Mechanical/Plumbing exceeding \$10,000 including labor and materials. For Plumbing contractors, contractors must provide a copy of their Master Plumbing License from the State Plumbing Board of Louisiana.
  - Asbestos, Hazardous Waste, Lead Based Paint Abatement/Removal, Underground Storage Tanks require a commercial license with appropriate classification for projects with a value of \$1.00 or more including labor and materials.
- Hire licensed subcontractors
- More than 19,000 licensed commercial contractors

# Commercial License

## What are the requirements for licensure?

- Complete and submit an application.
- Financial statement affidavit showing a minimum of \$10,000 net worth.
- Applicant must take Business & Law Course.
- Applicant must pass Trade Exam, if applicable.
- Business entities must be registered with the Louisiana Secretary of State.
- Once the license is issued the initial license certificate will be valid for one year, then you may renew your license for a one, two, or three year period.
- A Renewal notice will be emailed or mailed to the address on record approximately 60 days prior to the expiration, 15 days prior to expiration and upon expiration of the license.

# Residential License

## What does Residential License cover?

- Residential construction or home improvement projects exceeding \$75,000 including labor and materials.
- Subcontractors/specialty trades for residential projects where the labor and materials exceeds \$7500 for the following specialty classifications: Residential pile driving; residential foundations; residential framing; residential roofing; residential masonry/stucco; and residential swimming pools.
- Home Improvement projects
  - More than 4,000 licensed residential contractors
  - Hire licensed subcontractors

# Residential License

## What are the requirements for licensure?

- Complete and submit an application.
- Financial statement affidavit showing a minimum of \$10,000 net worth.
- Applicant must take Business and Law course.
- Applicant must pass trade exam, if applicable.
- Provide proof of general liability insurance with a minimum amount of \$100,000 and proof of workers' compensation coverage.
- Business entities must be registered with the Louisiana Secretary of State.

# Licensing Requirements for Building Homes

## **Residential Building Contractor License**

- Single family homes
- A single duplex, triplex, or fourplex

## **Commercial Building Construction License**

- Three or more single family homes built under the same contract in the same subdivision
- Two or more duplexes, triplexes, or fourplexes
- Apartment buildings or condominiums

# Residential Subcontract Labor Only Specialty Classifications

Subcontractors working under the direct supervision of a licensed residential building contractor may obtain a **Subcontract Labor Only** specialty classification by:

- Completing and submitting an application.
- Submitting an affidavit executed by a licensed residential building contractor that attests to the subcontractor's quality of work and character.
- Passing the Law, Rules, and Regulation Exam.
- Providing proof of current general liability and workers' compensation insurance.

# Home Improvement Registration

## **What does this registration cover?**

- Home improvement projects with a value exceeding \$7,500 but not in excess of \$75,000 including labor and materials.

## **What are the requirements to obtain registration?**

- Complete and submit an application.
  - Provide proof of general liability insurance with a minimum amount of \$100,000 and proof of workers' compensation coverage.
  - Business entities must be registered with the Louisiana Secretary of State.
- More than 2,200 registered home improvement contractors



# Mold Remediation License

## What does this license cover?

- Mold Remediation projects with a value of \$1.00 or more including labor and materials.

## What are the requirements for licensure?

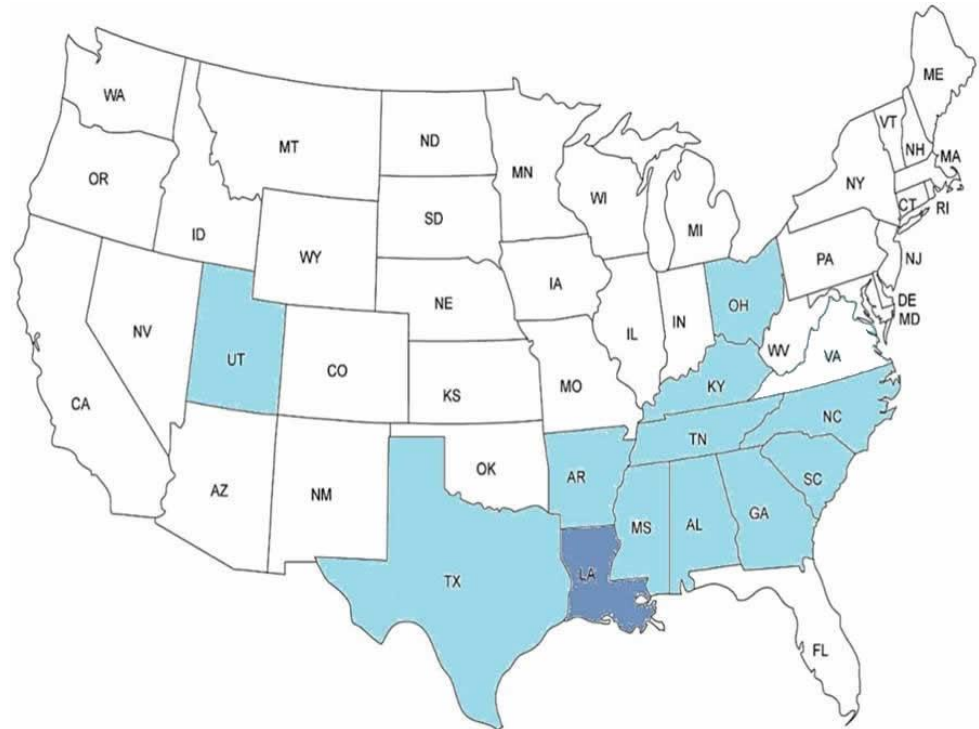
- Complete and submit application.
- Financial statement with a minimum of \$10,000 net worth.
- Applicant must pass Business and Law exam.
- Applicant must complete Louisiana's Unfair Trade and Consumer Protection Law seminar.
- Applicant must provide proof of Mold Remediation certification.
- Provide proof of general liability & workers' compensation insurance
- Business entities must be registered with the Louisiana Secretary of State.

➤ More than 200 licensed mold remediation contractors

# Reciprocity

- **Louisiana has reciprocity agreements with:**

- Alabama
- Arkansas
- Georgia
- Kentucky
- Mississippi
- North Carolina
- South Carolina
- Ohio
- Texas
- Tennessee
- Utah



# Contracts

- We calculate total of all labor and material cost to determine whether a contract reaches licensure limits.



# Penalties for Violating Licensing Law

- Unlicensed contractors up to 10% of contract value (Commercial & Residential)
- Licensed contractors
  - Maximum of \$1,000 per violation
  - Suspension
  - Revocation of License
  - Probation
- Home Improvement – up to 25% of contract value
- Other legal remedies: cease & desist orders, permanent injunctions, and court costs
- Contractor Fraud - May be imprisoned up to 5 years when convicted by a law enforcement agency

# Licensed Contractor...

## IT'S THE LAW

### Three ways to verify licensure:

1. LSLBC website [www.lacontractor.org](http://www.lacontractor.org)
2. LSLBC mobile app - La. Contractor
3. Text-to-Verify 1-855-999-7896

# LICENSING PROCESS

Click icons to view information for each step of the licensing process.

## Step 1

Submit Application or Request to Add a Qualifying Party/ Classification



## Step 2

Qualifying Party Meets Eligibility Requirements



## Step 3

Qualifying Party Receives Exam Approval Notification



## Step 4

Schedule Test via LSLBC Licensing Portal



## Step 5

Pass Test



**Return**

## Step 6

License Issued/ Updated





# Louisiana Licensing Board for Contractors

## Contact Information

**Website:**

[www.lacontractor.org](http://www.lacontractor.org)

**Phone**

1.225.765.2301

1.800.256.1392

# SMALL BUSINESS OVERVIEW

Small business is the backbone of our state's economy. More than 97% of businesses in Louisiana are small businesses, and Louisiana Economic Development is committed to connecting small businesses with the services and resources they need to grow and succeed. We help new entrepreneurs realize the dream of business ownership and existing businesses remain competitive.

PROGRAM NAME	BENEFIT	ELIGIBILITY (NOT COMPREHENSIVE)
<b>SMALL AND EMERGING BUSINESS DEVELOPMENT PROGRAM</b>	Provides developmental assistance including entrepreneurial training, marketing, computer skills, accounting, business planning, legal and industry specific assistance	<ul style="list-style-type: none"><li>• At least 51% of the company must be owned by a Louisiana resident, whose personal net worth cannot exceed \$400,000</li><li>• Business' net worth at the time of application may not exceed \$1.5 million</li></ul>
<b>BONDING ASSISTANCE PROGRAM</b>	Provides bond guarantees up to 25% or \$100,000, whichever is less, for qualifying contractors requiring surety bonds for private or public jobs	<ul style="list-style-type: none"><li>• Business must be certified in the Small and Emerging Business Development Program</li></ul>
<b>LOUISIANA CONTRACTORS ACCREDITATION INSTITUTE</b>	Provides business training focusing on expanding understanding of the construction industry	<ul style="list-style-type: none"><li>• Must have the intent to start or currently have an established construction based Louisiana business</li></ul>
<b>ECONOMIC GARDENING INITIATIVE</b>	Provides Louisiana-based small businesses with accelerated technical assistance and research from an experienced national economic gardening team	<ul style="list-style-type: none"><li>• Must have annual revenue between \$600,000 and \$50 million</li><li>• Must have at least five employees but not more than 99 employees</li><li>• Must demonstrate growth in annual revenue and/or jobs in two of the last five years</li></ul>



<p><b>CEO ROUNDTABLES</b></p>	<p>Provides peer-to-peer learning that gives executives the opportunity to discuss business practices and management strategies with other executives who deal with similar growth challenges</p>	<ul style="list-style-type: none"> <li>• Should typically have annual revenue between \$600,000 and \$50 million</li> <li>• Should typically have at least five but not more than 100 employees</li> </ul>
<p><b>HUDSON INITIATIVE</b></p>	<p>Provides small businesses with greater potential for access to state procurement and public contract opportunities</p>	<ul style="list-style-type: none"> <li>• Must be certified by LED, a Louisiana resident and have fewer than 50 full-time employees</li> </ul>
<p><b>VETERAN INITIATIVE</b></p>	<p>Provides veteran-owned and disabled, service oriented veteran-owned small businesses with greater potential for access to state procurement and public contract opportunities</p>	<ul style="list-style-type: none"> <li>• Must be at least 51% owned by a veteran or disabled, service-oriented veteran</li> <li>• Must be certified by LED, a Louisiana resident and have fewer than 50 full-time employees</li> </ul>



# SBA Certifications

## Women-Owned Small Business Federal Contracting program

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The federal government's goal is to award at least five percent of all federal contracting dollars to women-owned small businesses each year.

## Service-disabled Veteran-Owned Small Business program

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The federal government's goal is to award at least three percent of all federal contracting dollars to service-disabled veteran-owned small businesses each year.

## 8(a) Business Development program

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The federal government's goal is to award at least five percent of all federal contracting dollars to small disadvantaged businesses each year.

## HUBZone program

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The federal government's goal is to award at least three percent of all federal contracting dollars to HUBZone-certified small businesses each year.

# The SBA guarantees surety bonds

Surety bonds help small businesses win contracts by providing the customer with a guarantee that the work will be completed. Many public and private contracts require surety bonds, which are offered by surety companies. The SBA guarantees surety bonds for certain surety companies, which allows the companies to offer surety bonds to small businesses that might not meet the criteria for other sureties.

## How the SBA Surety Bond Program works

1



### Surety bonds are requested

Some contracts require that the business doing the work be properly bonded.

2



### Surety partners with business

Authorized surety companies provide surety bonds to businesses that meet their qualifications.

3



### The SBA guarantees

The SBA guarantees surety bonds for private surety companies, so more small businesses can qualify.

4



### Small businesses benefit

Small businesses get SBA-guaranteed surety bonds so they can get to work.

# Other Certifications

## Louisiana Department of Transportation and Development (DOTD)

- **DBE** -The Department's **Disadvantaged Business Enterprise** (DBE) program is designed to remedy ongoing discrimination and the continuing effects of past discrimination in federally-assisted highway, transit, airport, and highway safety financial assistance transportation contracting markets nationwide. **(City and State)**
  - The U.S. Department of Transportation's DBE (disadvantaged business enterprise) program provides a vehicle for increasing the participation by MBEs in state and local procurement.
- **SBE** - The **Small Business Element** (SBE) Program was created to remedy past and current discrimination against SBE firms. The intention is to level the playing field for economically disadvantaged individuals wanting to do business with the DOTD on U.S. Department of Transportation federally assisted projects.

## National Minority Supplier Development Council (NMSDC)

**MBE** - MBE Certification. A Minority Business Enterprise certification or MBE certification, defines your business as being owned, operated and controlled by a minority group. Certification is a valuable marketing tool for your small business, and can give you special consideration when bidding on contracts with local government.

# How to Start a Small Business?

## Develop a Business Plan

- Startup Costs, Product & Services, Management, Operations, Marketing, Funding, etc.

## Determine Business Structure

- Sole Proprietorship
- Partnerships
- Corporations
- Limited Liability Company (LLC)

## Register your Business - Secretary of State

([www.geauxBiz.com](http://www.geauxBiz.com))

Register your business name

Obtain a Federal Identification Number from Internal Revenue ([www.irs.gov](http://www.irs.gov))

Register with State Entities - ([www.geauxbiz.com](http://www.geauxbiz.com))

- Louisiana Secretary of State
- Louisiana Department of Revenue
- Louisiana Workforce Commission

Obtain industry – specific licenses and local licenses

Register with City for Occupational Licensing

Satisfy Tax Requirements

Satisfy Insurance Requirements

General Liability, Property, Business Interruption  
Worker's Compensation

Accountant, Attorney & Lender



# **Any Questions?**

**616 Harding Boulevard  
Baton Rouge, LA 70807**

**Contact Number  
(225) 771-2891**

**Website  
[www.louisianasbdc.org](http://www.louisianasbdc.org)**

# Real Estate Developer Tips for Marketing and Managing Properties

Strategies for Success in....  
Home Ownership Programs  
Short Term Rentals  
Multifamily and More

March  
2024

TONIA  ASKINS



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## How does branding and marketing mix with management?

Blend marketing and management techniques for closing deals and developing Strategies

Understand its not just how to sell properties, but also how to sell the lifestyle that comes with them.

Utilize a customer-centric approach, where you focus on understanding and meeting potential buyers' needs, leading to higher conversion rates.

# 120 Units – Affordable Mix Use

What was I selling  
as a manager?





# 69 Units - Luxury

# Maximizing Social Media Impact through Strategic Scheduling and Networking

## Leveraging Technology for Enhanced Business Connectivity



# TARGET MARKET

## 1. Understanding Your Target Market

- **Identify Your Audience:** Know who your customers are, their needs, preferences, and behaviors.
- **Customize Your Approach:** Tailor your marketing strategies to resonate with your target audience.
- **Market Research:** Regularly conduct surveys, focus groups, or use analytics to understand your audience better.



The key differences between branding and marketing:  
Branding answers the questions “who” and “why” of a business, while marketing answers the question of “how” to promote it.

Branding is a way to retain a customer’s attention and loyalty, while marketing is a way to attract new ones and increase sales.

Branding comes first and remains constant, while marketing follows and changes according to the methods and tools used.

Branding affects both the team and the clients of a business, while marketing targets the clients.

WHO ARE YOU TRAGETING?



**Tonia Askins**  
INTERNATIONAL

# BRAND ASSETS MATTER.

Branding  
Publishing  
Social Media  
Content Marketing

— — — —  
Create. Capture. Cultivate. Convert.

## Creative Services

We provide content writing for eBooks, print books, blogs, newsletters, articles, social media posts, company press releases and distribution. In addition we offer graphic design services for your website, flyer, ad, logo, book design and more.

## Management

Our services for management include social media, author management, executive and administrative services.

## Training

We provide training face to face and virtually, group as well as private. Our areas of training include: Social Media, Public Speaking, Hospitality, Marketing, Entrepreneurship, Soft Skills, Virtual Assistant, Customer Service and Executive Development.

# Online Presence

## 2. Building a Strong Online Presence

- **Website Development:** Ensure your website is user-friendly, mobile-optimized, and updated with relevant content.
- **SEO Best Practices:** Utilize Search Engine Optimization to increase visibility and attract more organic traffic.
- **Social Media Engagement:** Actively engage with your audience on platforms where they are most active.







# SEO

## 4. Leveraging Local SEO

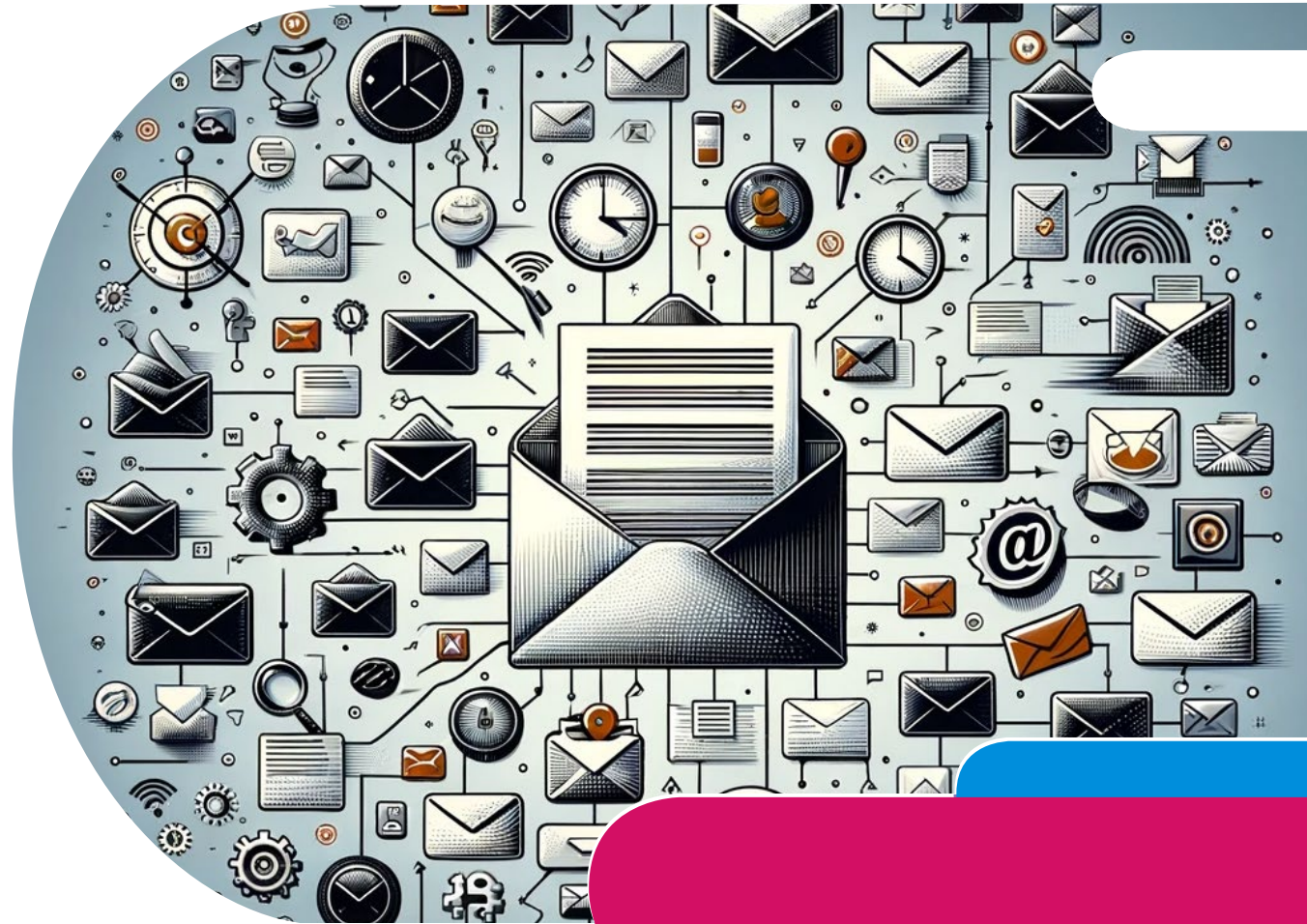
- **Google My Business:** Optimize your Google My Business listing for local searches.
- **Local Keywords:** Include local keywords in your website and content.
- **Community Engagement:** Participate in local events and collaborate with other local businesses.



# Email

## 5. Email Marketing

- **Building Email Lists:** Encourage website visitors to subscribe to your email list.
- **Personalization:** Personalize email content based on customer behavior and preferences.
- **Regular Updates:** Send regular updates about new products, services, and special offers.



# Social Media

## 6. Utilizing Social Media Marketing

- **Platform Selection:** Choose social media platforms that are most effective for your business and audience.
- **Engaging Content:** Post content that promotes engagement, such as polls, contests, and interactive posts.
- **Customer Interaction:** Promptly respond to comments, messages, and reviews.



# CRM

## 7. Customer Relationship Management

- **Feedback and Reviews:** Actively seek and respond to customer feedback and online reviews.
- **Loyalty Programs:** Implement loyalty programs to retain existing customers.
- **Customer Service:** Provide exceptional customer service to create positive word-of-mouth.



# Analyze and Adapt

## 8. Analyzing and Adapting

- **Performance Metrics:** Regularly analyze the performance of your marketing strategies.
- **Adaptability:** Be willing to adapt and change strategies based on what works and what doesn't.
- **Competitive Analysis:** Keep an eye on your competitors' strategies and market trends.



# Budget / Investment

## 9. Budget Management

- Cost-Effective Strategies:** Focus on cost-effective marketing strategies, especially if on a tight budget.
- ROI Monitoring:** Monitor the return on investment (ROI) of your marketing campaigns.
- Resource Allocation:** Allocate resources smartly across different marketing channels.



# Networking

## 10. Networking and Partnerships

- **Industry Networking:** Attend industry events, join associations, and engage in networking activities.
- **Strategic Partnerships:** Partner with other businesses to expand your reach and resources.
- **Referral Programs:** Implement referral programs to encourage word-of-mouth promotion.



# Introduction to digital landscape



Overview of today's digital landscape importance for retail.



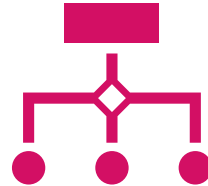
Brief on the agenda: scheduling benefits, platform statistics, and tap-to-share technology.



# Benefits of Scheduling Social Media Posts



Consistent content delivery enhances brand presence.



Time efficiency through batch content creation and scheduling.



Ability to target peak engagement times for better visibility.

# Social Media Platform Statistics – Overview / APRIL 23



## Instagram:

**Total Users:** Over 2 billion monthly active users.

**Daily Active Users:** More than 500 million daily active users.

## Facebook:

**Total Users:** Over 2.9 billion monthly active users, making it the largest social media platform.

**Daily Active Users:** Approximately 1.93 billion people use Facebook daily.

# Social Media Platform Statistics – Overview / APRIL 23



## TikTok:

**Total Users:** TikTok has surpassed 1 billion monthly active users.

**Daily Active Users:** The platform has not consistently disclosed daily active user figures, but estimates suggest several hundred million daily active users globally.

## Pinterest:

**Total Users:** Over 450 million monthly active users.

**Daily Active Users:** Pinterest does not typically release daily active user statistics, but the platform's unique monthly visitors are a testament to its reach.



# How to Schedule Posts on Social Media - FB



01

## Scheduling a Post on Facebook:

02

Go to Your Page: Log in to your Facebook account and navigate to your business page.

03

Create a Post: Click on the 'Create' button or the box that says 'Write a post...' at the top of your Page's timeline.

04

Compose Your Post: Add text, images, videos, or any other content you want to include in your post.

05

Schedule the Post: Click the small clock icon or the 'Publish' dropdown menu found near the 'Post' button. Select 'Schedule Post' and choose the date and

06

Confirm: Once you've selected the date and time, click 'Schedule' to finalize the process.



# How to Schedule on IG



01

**Scheduling a Post on Instagram (via Facebook's Creator Studio):**

02

Access Creator Studio: Go to Facebook's Creator Studio and select the Instagram icon at the top of the

03

Connect Your Account: Make sure your Instagram account is connected to Creator Studio.

04

Create a Post: Click on the 'Create Post' button, then choose 'Instagram Feed'.

05

Compose Your Post: Upload your image or video, and write your caption. You can also add a location and tag

06

Schedule: Below the post preview, click on the dropdown next to 'Publish' and select 'Schedule'. Choose your

07

Publish: Click 'Schedule' to set your post.

# How to Schedule Pinterest



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01

**Scheduling a Post on Pinterest:**

02

Go to Your Profile: Log in to your Pinterest account and go to your profile.

03

Create a Pin: Click on the '+' sign at the bottom right corner of the screen and select 'Create Pin'.

04

Upload and Customize: Upload your image or video, add a title, description, and the destination

05

Choose a Board: Select the board you want to pin to or create a new one.

06

Schedule: Click on the dropdown arrow next to the 'Publish' button and select 'Schedule'. Pick the date and time

07

Publish: Click 'Schedule' to finalize your pin scheduling.

# Fb Stats



## User Demographics:

- Age Distribution: Facebook's user base is broad, with significant representation across various age groups. The largest age group of Facebook users is 25-34, followed by users aged 18-24.
- Gender: Approximately 56% of Facebook's users are male, while 44% are female.
- Geographical Spread: Facebook is used worldwide, with India, the United States, and Indonesia being the top countries in terms of the number of users.
- Usage: A substantial portion of Facebook users accesses the platform on a daily basis, making it a vital part of their digital routine.

# Engagement Statistics:

- **Peak Usage Times:** Generally, the best times to post on Facebook are weekdays between 9 am and 1 pm, especially on Tuesday, Wednesday, and Friday.
- **Content Engagement:** Video content tends to perform well on Facebook, with live videos receiving significantly higher engagement than pre-recorded ones.
- **Interaction:** Posts that provoke thought, ask questions, or encourage user interaction, such as polls or quizzes, tend to have higher engagement rates.



## Best Times to Post:

- Overall: The best times to post can vary based on your specific audience, but in general, posting on weekday mornings aligns with increased usage.
- By Industry: Depending on your industry, these times might shift. For example, B2C businesses might find evenings and weekends more effective, while B2B businesses may stick to business hours.

# Networking and data sharing offer numerous benefits for retail shops, enhancing their operational efficiency, market understanding, customer relations, and strategic planning. Here are some key advantages:

**Improved Market Insights:** Data sharing allows retail shops to gain a better understanding of market trends and consumer preferences. By analyzing shared data, retailers can identify popular products, peak shopping times, and emerging market trends, enabling them to make informed decisions about inventory, marketing, and sales strategies.

**Enhanced Customer Experience:** Networking with other businesses and sharing customer data (while respecting privacy and data protection regulations) can help retailers understand their customers' needs and preferences better, leading to improved customer service, personalized marketing, and tailored product offerings.

**Collaboration Opportunities:** Networking can lead to partnerships with other businesses, such as joint marketing campaigns, shared events, or collaborative product lines, which can expand a retail shop's reach and appeal.

**Access to New Technologies:** Through networking, retailers can learn about and gain access to new technologies and tools that other businesses use successfully. This can include innovations in inventory management, customer relationship management (CRM) systems, or e-commerce platforms.

**Operational Efficiency:** Data sharing can streamline operations, reducing redundancies and identifying more efficient processes. For example, sharing data with suppliers can lead to more accurate demand forecasting and inventory management.

**Competitive Advantage:** Retailers that effectively network and leverage shared data can gain insights that provide a competitive edge, whether through better customer understanding, more efficient operations, or innovative products and services.

**Risk Mitigation:** Networking and data sharing can help retailers identify potential risks and challenges in the industry, from supply chain disruptions to changing consumer behaviors, allowing them to adapt proactively.

**Cost Reduction:** By sharing resources, information, and technologies, retail shops can reduce costs. For example, collaborative buying or shared marketing efforts can lower expenses for individual retailers.

**Community Engagement:** Networking within the local community can enhance a retail shop's reputation and customer loyalty. Engaging with community events, local causes, and other businesses can create a supportive ecosystem benefiting all participants.

**Learning and Development:** Interacting with peers and sharing knowledge can lead to new learning opportunities for retail shop owners and their staff, fostering a culture of continuous improvement and innovation.

By effectively networking and sharing data, retail shops can not only improve their internal operations but also create more value for their customers and the broader community, positioning themselves as adaptable and forward-thinking businesses in a competitive market.

# Top 5 Real Estate Management Tips



## Top 5 Real Estate Management Tips

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**Look to someone who or increase you and your staff skills and proficiencies in these areas.**

**Market Analysis and Trends:** Understanding the local and broader real estate markets is crucial. This includes knowledge of current trends, pricing dynamics, and future projections. Real estate managers should be adept at analyzing market data to make informed decisions regarding property acquisitions, sales, and development opportunities.

## Top 5 Real Estate Management Tips

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**Look to someone who or increase you and your staff skills and proficiencies in these areas.**

**Financial Acumen:** Top real estate managers must have a solid grasp of financial principles relevant to real estate. This includes understanding financial statements, budgeting, cash flow analysis, financing options, and investment valuation. Being able to analyze and interpret financial information is key to successful property management and investment strategies.

## Top 5 Real Estate Management Tips

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**Look to someone who or increase you and your staff skills and proficiencies in these areas.**

**Legal and Regulatory Compliance:** Real estate is heavily regulated. Managers need to be familiar with the laws and regulations affecting property, including zoning laws, lease agreements, fair housing, and property rights. Ensuring compliance is essential to avoid legal issues and to protect the interests of property owners and investors.

## Top 5 Real Estate Management Tips

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**Look to someone who or increase you and your staff skills and proficiencies in these areas.**

**Communication and Negotiation Skills:** Real estate management often involves interacting with a variety of stakeholders, including investors, tenants, contractors, and government officials. Strong communication skills are necessary to effectively convey information, manage relationships, and negotiate deals. Being able to articulate ideas clearly and negotiate effectively can lead to better outcomes in leasing, acquisitions, and other business dealings.

# Remodeling Contractor/ RE Developer/ Investor/Manager and Marketing

## Small Business Service Provider

### Creative Services

- We provide content writing for eBooks, print books, blogs, newsletters, articles, social media posts, company press releases and distribution. In addition, we offer graphic design services for your website, flyer, ad, logo, book design and more.

### Management

- Our services for management include social media, author management, executive and administrative services.

### Coaching

- Assisting Owners and Management in Mastering Your Mindset, Time Management, Work life Balance, and various other Personal Strategic Success Sessions.

### Team Training

- We provide training face to face and virtually, group as well as private. Our areas of training include Social Media, Public Speaking, Hospitality, Marketing, Entrepreneurship, Soft Skills, Virtual Assistant, Customer Service and Executive Development.



# THANK YOU!

---

**Tonia Askins**

Phone:

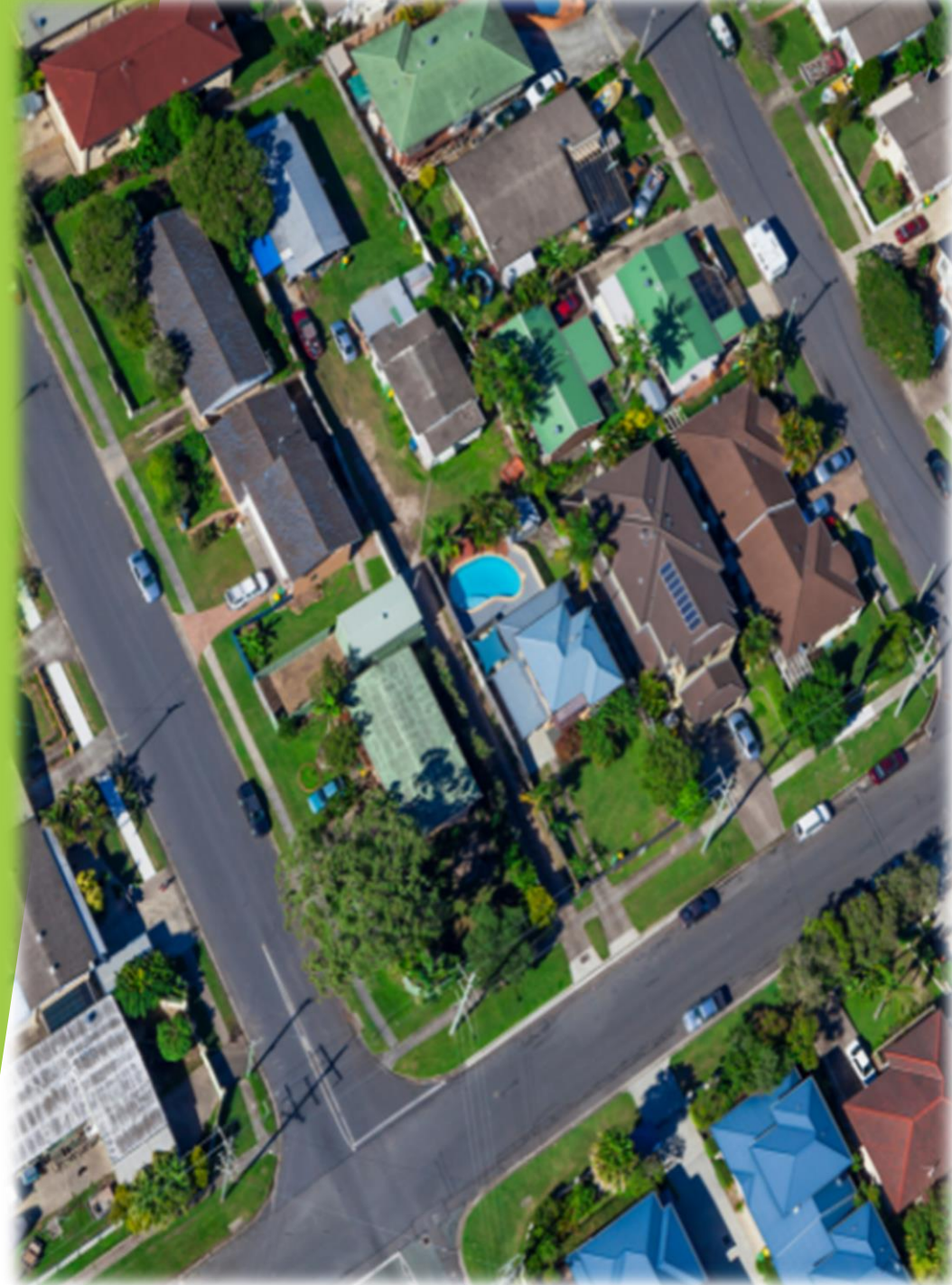
**225-610-3853**

Email:

**[info@toniaaskins.com](mailto:info@toniaaskins.com)**

Tonia Askins International LLC





# *CLEM JR DEVELOPMENT*

**CREATING NEIGHBORHOOD DEVELOPERS**  
**PROJECT DEVELOPMENT & CONSTRUCTION**

# KNOW YOUR MARKET AREA

- ▶ 1. WHO ARE BUYING THE HOMES
- ▶ 2. IS THERE A SHORTAGE OF AFFORDABLE HOMES IN THIS MARKET
- ▶ 3. IS IT FEASIBLE TO BUILD IN THIS MARKET
- ▶ 4. WHAT TYPE OF HOUSE/S CAN I BUILD
- ▶ 5. WILL I GET THE REVENUE I AM EXPECTING

# BUILDING RELATIONSHIP WITH THE RIGHT PLAYERS:

1. BUILD A RELATIONSHIP WITH YOUR BANK
2. KNOW YOUR BANK DECISION MAKING PROCESS
3. NEVER BRING YOUR BANK A BAD DEAL



# FINANCIAL STATEMENTS

1. YOU HAVE TO HAVE A BALANCE SHEET
2. YOU HAVE TO HAVE A PROFIT & LOSS SHEET
3. PROVIDE THE LAST THREE YEAR TAX RETURNS



# LOCAL ECONOMIC DEVELOPMENT OFFICERS - DIRECTORS - MANAGERS

- ▶ **1. DOES THE CITY OR PARISH HAVE MONEY TO DISPERSE?**
- ▶ **2. HOW MUNCH LIQUIDITY DO YOU HAVE TO PLEDGE TO THE PROJECT**
- ▶ **3. MAKE SURE YOU MAKE A PROFIT**

# CLEM JR DEVELOPMENT

RENOVATION CONSTRUCTION



RENOVATION CONSTRUCTION



# CLEM JR DEVELOPMENT





# CLEM JR DEVELOPMENT

NEW CONSTRUCTION

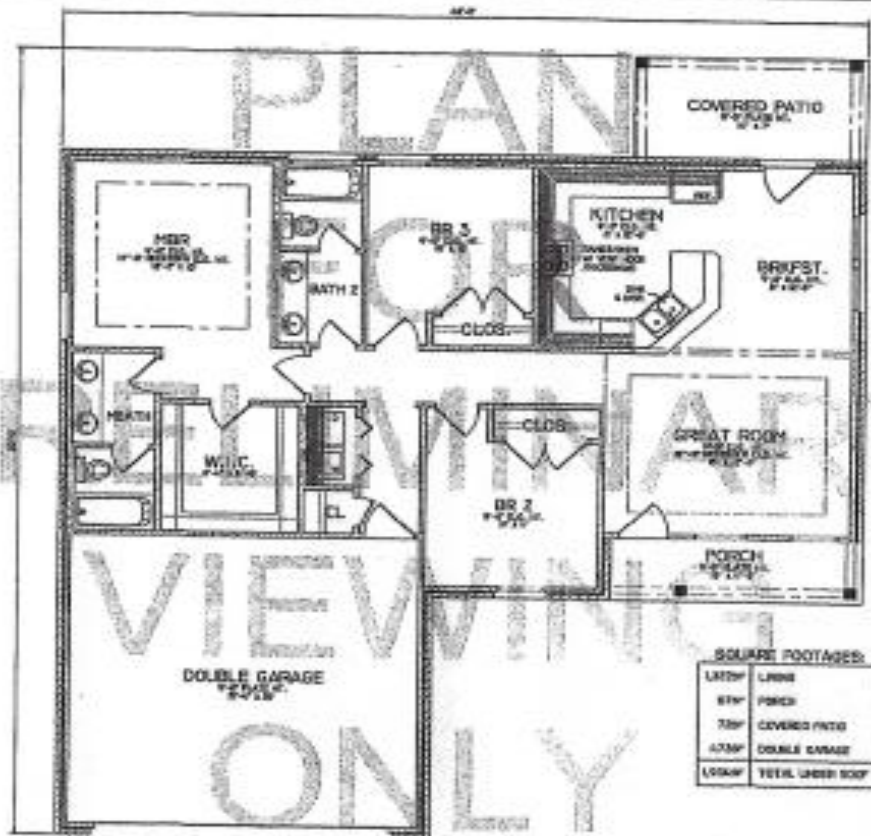


NEW CONSTRUCTION



# CLEM JR DEVELOPMENT





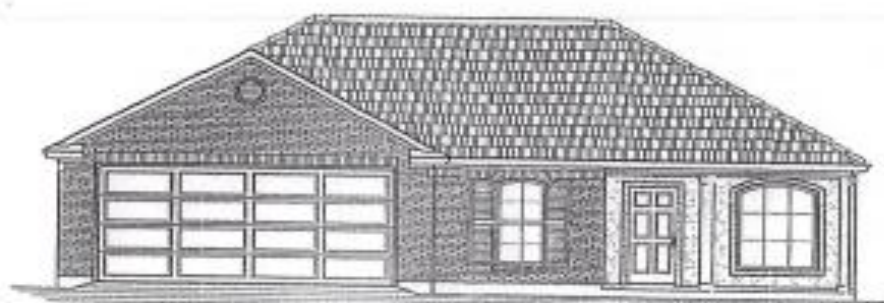
SQUARE FOOTAGES:

1270*	LIVING
870*	PORCH
730*	COVERED PATIO
4700*	DOUBLE GARAGE
10000*	TOTAL UNDER ROOF

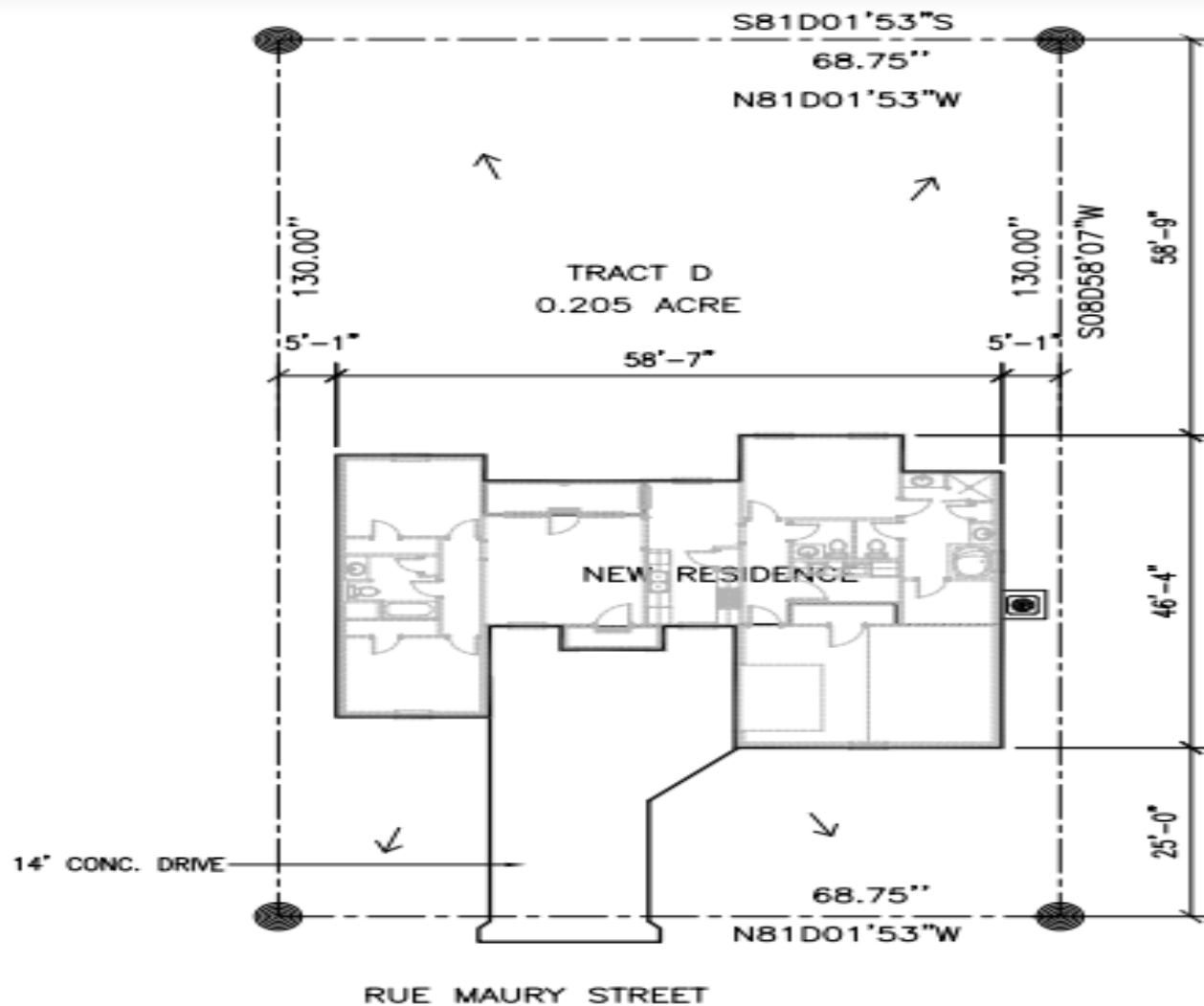
FLOOR PLAN



FRONT ELEVATION "A"



FRONT ELEVATION "B"

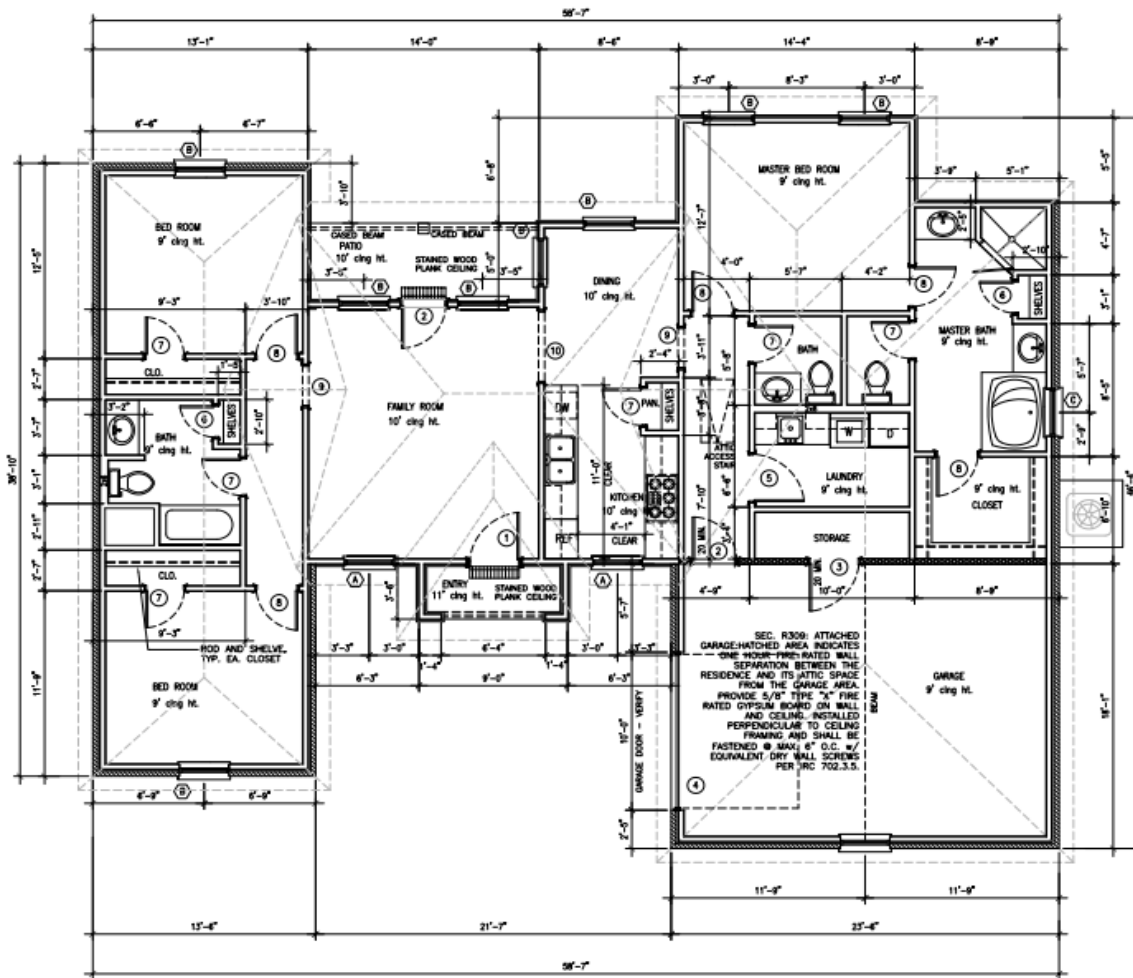


# 1 SITE PLAN

SCALE: 1" = 20'-0"

↑ WATER FLOW

1. CONCRETE DRIVE SHALL BE 6" WITH 6x6x10 GAUGE WELDED WIRE MESH REINFORCING INCLUDING WALKWAYS EXPANSION JOINTS MUST BE AT MINIMUM OF 8' LIGHT BROOM FINISH ON DRIVEWAY WALKWAY TO HAVE EXPOSED AGGREGATE FINISH
2. SLOPE AS NECESSARY TO DIVERT WATER AWAY FROM RESIDENCE.
3. CONTRACTOR SHALL VERIFY ALL UTILITY CONNECTIONS.
4. CONTRACTOR SHALL COORDINATE POWER FOR SPRINKLER SYSTEM AND LANDSCAPE LIGHTING.
5. CONTRACTOR SHALL COORDINATE ANY FENCING (LOCATION AND TYPE) WITH OWNER.



**1 FLOOR PLAN**  
SCALE: 1/4" = 1'-0"

ALL WALLS OVER 10'-0" HIGH TO BE 2x6 AT 16" O.C. AND RECEIVE 2 ROWS OF 2x6 BLOCKING AT 1/3 POINTS OF HEIGHT.

NOTE:  
INTERIOR DIMENSIONS TO FACE OF STUD - EXTERIOR DIMENSIONS TO FACE OF SLAB UNLESS OTHERWISE NOTED.

CODE REFERENCES:  
IRC INTERNATIONAL RESIDENTIAL CODE  
NEC NATIONAL ELECTRIC CODE  
PLUMBING LOUISIANA STATE PLUMBING CODE

SEC. R602.10.3: WALLS ADJACENT TO GARAGE DOOR OPENINGS MUST BE SHEATHED AND THE MINIMUM LENGTHS PROVIDED IN TABLE R602.10.5 OR HAVE AN ENGINEERED METHOD OF RESISTING SHEAR.

**NOTES**

- G.C. TO COORDINATE GAS SERVICE REQUIREMENTS WITH THE OWNER.
- G.C. TO CONSULT AND COORDINATE WITH OWNER AND THE PLANS FOR ALL BUILT IN REQUIREMENTS INCLUDING SHELVING, CLOSETS, PANTRY, BOOKCASES, ETC.
- G.C. TO CONSULT AND COORDINATE WITH OWNER CONCERNING REQUIREMENTS FOR SECURITY SYSTEMS AND ANY AUDIO, COMPUTER OR TELEVISION (INCLUDING SATELITE) SYSTEMS.
- G.C. TO VERIFY EXISTING TOPOGRAPHIC GRADE LEVELS. LOCATION OF TREES AND THE PROPOSED HOUSE LOCATION. G.C. TO COMMUNICATE TO OWNER ANY RECOMMENDED CHANGES BEFORE THE START OF WORK.
- G.C. TO LOCATE ALL UTILITY SERVICES I.E. WATER, SEWER, GAS, ELECTRIC, TELEPHONE, CABLE TV AND COORDINATE THE EXTENSIONS TO THE HOUSE WITH THE APPROPRIATE INSTALLER. ALL CONNECTIONS, METERS, CLEAN OUTS, ETC. TO BE LOCATED AWAY FROM THE PROMINENT VIEW.
- G.C. TO COORDINATE FINISH TOPOGRAPHIC GRADING AND PAVING OF WALKS, DRIVEWAYS, PATIOS, ETC., AS REQUIRED FOR POSITIVE DRAINAGE AWAY FROM HOUSE.
- G.C. TO COORDINATE ALL LANDSCAPING WITH THE OWNER AND DETERMINE WHETHER THE LANDSCAPING PACKAGE IS TO BE PROVIDED BY GENERAL CONTRACTOR OR BY OTHERS.
- GENERAL CONTRACTOR TO INSPECT THE JOB SITE AND EXCAVATED CONDITIONS PRIOR TO STARTING CONSTRUCTION G.C. TO COMMUNICATE WITH OWNER ANY CONDITIONS REGARDING SOILS, GROUND WATER OR ANY OTHER ISSUE WHICH MAY REQUIRE ADDITIONAL OR SPECIAL ENGINEERING DESIGN BY A LICENSED STRUCTURAL ENGINEER.
- G.C. TO ENSURE THAT PREFAB FIREPLACE CONSTRUCTION MEETS OR EXCEEDS ALL APPLICABLE CODES. PROVIDE COMBUSTIBLE AIR VENTS, WITH SCREEN AND BACK DAMPER, FOR FIREPLACES, WOOD STOVES AND ANY APPLIANCE WITH AN OPEN FLAME. ALL FIREPLACE CHASE WALLS TO BE INSULATED INSIDE AND OUTSIDE. PROVIDE HORIZONTAL DRAFT STOPS AT EACH FLOOR LEVEL BY PACKING 6" (R-13) INSULATION BETWEEN JOIST.
- G.C. TO VERIFY FOOTING DEPTHS WITH LOCAL FROST REQUIREMENTS OR EXISTING SOIL CONDITIONS, WHICHEVER IS MORE RESTRICTIVE.
- G.C. TO VIEW ALL FINISH FLOOR MATERIALS, ALL FINISH FLOORS TO BE INSTALLED TO BE FLUSH WITH ADJACENT FLOORS OF SIMILAR OR DISSIMILAR MATERIALS, G.C. TO ADJUST THE FOUNDATION AS REQUIRED TO ENSURE THAT ALL FLOORS ARE FLUSH.
- G.C. IS RESPONSIBLE FOR CONSULTING WITH LOCAL CODE OFFICIALS PRIOR TO USING THE FRAMING MATERIALS PROVIDED TO INSURE COMPLIANCE WITH CODES AND STRUCTURAL INTEGRITY. DUE TO VARIATIONS IN LOCAL CODES AND GEOLOGICAL CONDITIONS, REVISIONS MAY BE REQUIRED TO THESE PLANS.
- ALL WOOD FRAMING IN CONTACT WITH CONCRETE OR MASONRY TO BE PRESSURE TREATED.
- FLOOR FRAMING LAYOUT TO BE COORDINATED WITH THE GENERAL AND HVAC CONTRACTORS TO PROVIDE ACCESS CHASES AND UNOBSTRUCTED RUNS FOR HVAC DUCTWORK.
- PROVIDE R-13 BATT INSULATION IN 2x4 WALLS AND R13 IN 2x4 WALLS, MINIMUM R-30 INSULATION IN FLAT CEILING AND R-15 IN VAULTED CEILINGS, ALLOW 1/2" MIN. AIRSPACE BETWEEN SHEATHING AND INSULATION. INSTALL INSULATION WITH BARRIER TO WORM SIDE.
- ALL BATH AND TOILET AREA WALLS AND CEILING ADJACENT TO WET AREAS TO HAVE WATER RESISTANT GYPSUM BOARD.
- BATHROOMS AND UTILITY ROOMS TO BE VENTED TO THE OUTSIDE WITH A MIN. OF 90 CFM FAN. RANGE HOODS TO BE VENTED TO OUTSIDE.
- ALL GLASS LOCATED WITHIN 18" OF FLOOR, 24" OF A DOOR OR 90" OF FLOOR AT BATHUBS, WHIRLPOOLS, SHOWERS, SAUNAS, STEAM ROOMS OR HOT TUBS TO BE TEMPERED.
- PROVIDE TERMITE TREATMENT PRIOR TO POURING SLAB.

**OPENING SCHEDULE**

MARK	SIZE (W x H)	THICK	DESCRIPTION
1	3'-0" x 7'-0"	1 3/4"	EXTERIOR GRADE, SG WOOD, FULL LIFE
2	3'-0" x 6'-6"	1 3/4"	EXTERIOR GRADE, SG WOOD, FULL LIFE
3	3'-0" x 6'-6"	1 3/4"	EXTERIOR GRADE, INSULATED, METAL
4	10'-0" x 7'-0"	STD.	GARAGE DOOR W/ DOOR OPENER
5	3'-0" x 6'-6"	1 3/8"	INTERIOR GRADE, SMOOTH MASONRY
6	2'-0" x 6'-6"	1 3/8"	INTERIOR GRADE, SMOOTH MASONRY
7	2'-4" x 6'-6"	1 3/8"	INTERIOR GRADE, SMOOTH MASONRY
8	3'-0" x 6'-6"	1 3/8"	INTERIOR GRADE, SMOOTH MASONRY
9	2'-0" x 7'-0"		CASED OPENING
10	3'-0" x 7'-0"		CASED OPENING

ALL WINDOWS TO INSULATED LOW "C" ALL WINDOWS TO BE COORDINATED WITH OWNER BEFORE INSTALLATION

MARK	SIZE (W x H)	DESCRIPTION
A	3'-0" x 6'-4"	SINGLE HUNG, WHITE ALUMINUM, INSULATED.
B	3'-0" x 6'-0"	SINGLE HUNG, WHITE ALUMINUM, INSULATED.
C	3'-0" x 3'-0"	GLASS BLOCK

**DOOR AND WINDOW HEADER SPANS**

UP TO 2'-6"	2 - 2 X 4
2'-6" TO 4'-0"	2 - 2 X 6
4'-0" TO 6'-0"	2 - 2 X 8
6'-0" TO 8'-0"	2 - 2 X 10
8'-0" TO 10'-0"	2 - 2 X 12
10'-0" TO 12'-0"	2 - 2 X 12 WITH 1/2" PLYWOOD FILLER
12'-0" TO 16'-0"	2 - 11-1/2" MICROLAM

**BRICK LINTEL STEEL ANGE SIZES**  
FOR OPENINGS WITH BRICK ABOVE MINIMUM 4" BEARING AT EACH END

UP TO 6'-0"	3-1/2" X 3-1/2" X 1/4"
6'-0" TO 8'-0"	4" X 3" X 3/8"
8'-0" TO 10'-0"	5" X 4" X 3/8"
10'-0" TO 14'-0"	6" X 4" X 1/2"
14'-0" TO 20'-0"	(2) 6" X 4" X 1/2"

1. CONTRACTOR TO COORDINATE ALL APPLIANCES WITH PRIOR TO INSTALLATION.

2. CONTRACTOR TO COORDINATE ALL COUNTER TOPS, CABINETS, SHELVES AND MILLWORK WITH OWNER PRIOR TO INSTALLATION.

NOTE:  
LOCAL VARIATIONS MAY REQUIRE CHANGES. BUILDING CODE REQUIREMENTS VARY WITH LOCATION AND CHANGE FROM TIME TO TIME. BEFORE STARTING CONSTRUCTION, THE BUILDER MUST REVIEW AND BE RESPONSIBLE TO INSURE THAT THE RESIDENCE TO BE BUILT TO MEET ALL CURRENT GOVERNMENT REQUIREMENTS AND CODES IN THE PARTICULAR AREA.

COORDINATE ALL FLOOR FINISHES WITH OWNER BEFORE INSTALLATION.

COORDINATE ALL MILLWORK WITH OWNER BEFORE INSTALLATION.

EACH CRAFT SHALL BE RESPONSIBLE FOR CLEANING THEIR PORTION OF WORK.

**MOLDINGS TYPES**  
SCALE: N.T.S.

FINAL MOLDING TYPE(S) AND QUANTITY TO BE APPROVED BY THE OWNER PRIOR TO INSTALLATION.

**AREA CALCULATIONS**

LIVING	= 1,496 SQ.FT
GARAGE/STORAGE	= 459 SQ.FT
PORCH/PATIO	= 102 SQ.FT
<b>TOTAL SQ.FT</b>	<b>= 2,057 SQ.FT</b>

DESIGNER:  
EDWARD SMITH  
5109 HARDING ST. BAKER, LA.  
(225) 803-8440

NEW RESIDENCE FOR  
**CLEM JR. DEVELOPMENT, LLC**  
RUE MAURY STREET  
TRACT D  
VILLE PLATTE, LA 70586

THE DESIGNER STANDS NO LIABILITY FOR STRUCTURAL OR ARCHITECTURAL DESIGN INTEGRITY. EVERY EFFORT HAS BEEN MADE TO ENSURE ALL DIMENSIONS ARE CORRECT AND GOVERNMENTAL REGULATIONS HAVE BEEN MET. IF AN ERROR OR OMISSION DOES OCCUR IT IS THE SOLE RESPONSIBILITY OF THE CONTRACTOR AND/OR OWNER TO CORRECT THE ERROR AND/OR OMISSION AT HIS OWN EXPENSE AND NOT THE RESPONSIBILITY OF THE DESIGNER.

NO.	REVISIONS	DATE

PROJECT NO.:	SHEET NO.
DRAWING FILE:	<b>A1</b>
DRAWN/CHECKED:	
JAN. 19, 2021	









PLUMBING LEGEND					
PLUMBING FIXTURE SCHEDULE					
SYMBOL	DESCRIPTION	CM	H	W	VENT
WC	WATER CLOSET (TANK)	1/2"	---	4"	3"
LAV	LAVATORY	1/2"	1/2"	2"	2"
SINK	SINK	1/2"	1/2"	2"	2"
SHOWER	SHOWER	1/2"	1/2"	2"	2"
JACUZZI	JACUZZI	3/4"	3/4"	2"	3"

WATER PIPE SIZING TABLE	
NUMBER OF FIXTURES	PIPE SIZE (IPS)
2 OR LESS	1/2"
3 TO 5	3/4"
6 TO 10	1"
11 TO 15	1-1/4"

ALL PLUMBING AND MECHANICAL VENTS TO BE LOCATED CLOSE TOGETHER WITHIN THE ATTIC SPACE WHEN POSSIBLE TO MINIMIZE THE NUMBER OF ROOF PENETRATIONS. ALL PLUMBING AND MECHANICAL VENTS WHICH APPEAR ABOVE THE ROOF TO BE LOCATED AWAY FROM ANY PROJECTING ROOF OR VENTS TO BE ALLOWED ON THE FRONT ROOF. ALL METAL AND PVC VENTS AND PENETRATIONS TO BE FINISHED AND PAINTED TO CLOSELY MATCH THE ROOF COLOR.

HVAC DUCT SIZING SCHEDULE			
CFM	DUCT SIZE (IN)	DUCT SIZE (IN)	DUCT SIZE (IN)
50 - 65	6"	6"	6"
65 - 80	6"	6"	6"
80 - 100	6"	6"	7"
100 - 125	7"	7"	7"
125 - 150	8"	8"	8"
150 - 180	8"	8"	8"
180 - 220	9"	9"	9"
220 - 250	9"	10"	10"
250 - 300	10"	10"	10"
300 - 350	10"	11"	11"
350 - 400	11"	11"	11"
400 - 500	12"	12"	12"
500 - 600	12"	12"	12"

**ELECTRICAL INFORMATION:**  
 REFERENCE: NEC/NEC-1, IFC, IBC  
 MIN. 200 AMP  
 ELECTRICAL CODES TO VERIFY  
 PANEL: FLUSH MOUNT, 30 CIRCUITS  
 CIRCUMFERENCE SHALL BE AS SHOWN AND VERIFIED BY ELECTRICAL CONTRACTOR

**TELEPHONE REQUIRED TO CALL -**  
 COORDINATE ALL CABLE CONNECTIONS AND WIRE CONNECTIONS WITH OWNER PRIOR TO INSTALLATION (SEE EXHIBIT SHEET)

**NOTE A:**  
 INSTALL LIGHT IN ATTIC WITH SWITCH WITHIN 12" OF ACCESS STAIRS, TYPICAL AT ALL ACCESS STAIRS

**NOTE B:**  
 COORDINATE ALL ELECTRICAL FIXTURES WITH OWNER PRIOR TO INSTALLATION

**NOTE C:**  
 CARBON MONOXIDE ALARMS - REQUIRED IN THE MASTER BEDROOM OF THE RESIDENCE IN BUILDING UNITS WITHIN WHICH FUEL-BURNING APPLIANCES ARE INSTALLED AND IN BUILDING UNITS THAT HAVE ATTACHED GARAGES

**NOTE D:**  
 PROVIDE MOTION DETECTORS ON ALL FLOOR LEVELS

- ELECTRICAL LEGEND:**
- SINGLE OUTLET
  - ⊕ WEATHERPROOF OUTLET
  - SINGLE POLE SWITCH
  - ☎ TELEPHONE
  - ⊕ CABLE TV/SAT
  - ⊕ HEAT/VENT/LIGHT FEATURE
  - ⊕ RECESSED LIGHT FEATURE
  - ⊕ HANGING FEATURE
  - ⊕ WALL MOUNTED FEATURE
  - ⊕ DOOR-BELL CHIMES
  - ⊕ DR. BELL
  - ⊕ SECURITY SYSTEM KEYPAD
  - ⊕ INSTALLED PER IFC W/ VENT FIX.
  - ⊕ PANEL BOX
  - ⊕ RECESSED FLOOR LIGHT FEATURE
  - ⊕ SMOKE DETECTOR

COORDINATE ALL MECHANICAL COMPONENTS WITH OWNER BEFORE INSTALLATION.

THIS HVAC/DUCT LAYOUT IS FOR SCHEMATIC PURPOSES ONLY. FINAL LAYOUT WILL BE DETERMINED BY MECHANICAL/PLUMBING CONTRACTOR.

HVAC PLAN SHOULD BE RECALCULATED BY A QUALIFIED HEATING AND COOLING PROFESSIONAL. HE SHALL BE RESPONSIBLE FOR VERIFYING THE EQUIPMENT SIZED BEFORE IT IS PURCHASED.

COORDINATE ALL PLUMBING COMPONENTS WITH OWNER BEFORE INSTALLATION.

THIS PLUMBING LAYOUT IS FOR SCHEMATIC PURPOSES ONLY. FINAL LAYOUT WILL BE DETERMINED BY MECHANICAL/PLUMBING CONTRACTOR.

- PLUMBING FIXTURES (VERIFY):**
- 1 QTY S.S. SINK
  - 4 QTY SINKS (BATHROOMS)
  - SINK IN CABINET (LAUNDRY)
  - SHOWER WITH TILE SURROUND AND GLASS DOOR (MASTER BATH)
  - 1 QTY FIREGLASS SOAKER TUB
  - 1 QTY FAUCET (3 PC) FOR TUB (MASTER BATH)
  - 1 QTY BATH/SHOWER FAUCET CONTROL COMBO (MASTER BATHROOM)
  - 1 QTY FAUCET W/SPRAYER (3 PC) (KITCHEN)
  - 1 QTY FAUCETS W/SPRAYER (2 PC) (LAUNDRY)
  - 1 QTY SHOWER FAUCET CONTROL (MASTER BATH)
  - 3 QTY TOILETS (BATHROOMS)
  - 1 QTY WHIRLPOOL TUB WITH JETS - MARBLE DECKING
  - RANGE HOOD
- CONTRACTOR SHALL PROVIDE GAS TO HOOK UP THE FOLLOWING:  
 -36" BURNER GAS COOK TOP

**GENERAL NOTES**

1. ALL ELECTRICAL OUTLETS IN THE KITCHEN, BATHROOMS, UTILITY, POWDER, GARAGE AND EXTERIOR ARE TO BE GROUND-Fault CIRCUIT-INTERUPTER (GFI) TYPE.
2. GARAGE IS TO BE PRE-WIRED FOR ELECTRIC GARAGE DOOR OPENERS.
3. GARAGE OUTLETS INSTALLED AT 42 IN ABOVE FINISH FLOOR.
4. RESIDENCE TO BE PRE-WIRED FOR SECURITY SYSTEM.
5. PROVIDE DOORBELL FOR FRONT DOOR AND REAR DOOR AS SHOWN.
6. PROVIDE MOTION DETECTORS ON ALL FLOOR LEVELS.
7. COORDINATE ALL ELECTRICAL FIXTURES AND LOCATIONS OWNER PRIOR TO INSTALLATION.
8. PROVIDE LIGHT IN ATTIC AT ATTIC STAIR.

DESIGNER:  
 EDWARD SMITH  
 5100 HARDING ST., BARKER, LA.  
 (225) 802-8440

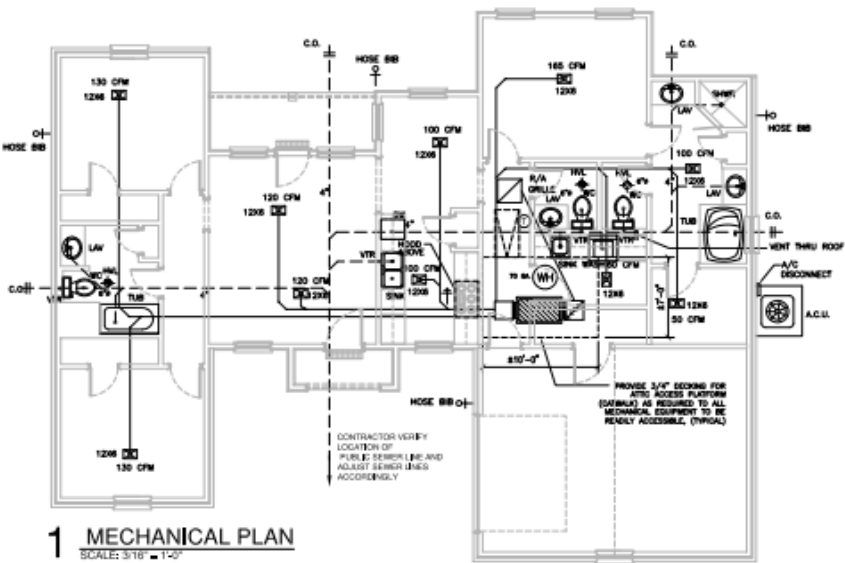
NEW RESIDENCE FOR  
 CLEM JR. DEVELOPMENT, LLC  
 RUE MAURY STREET  
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NO.	REVISIONS	DATE

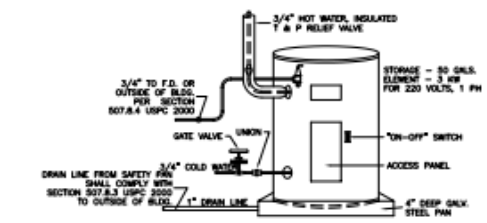
  

PROJECT FILE:	SHEET NO.
DRAWING FILE:	A5
DRAWING CHECKED:	
JAN. 18, 2021	

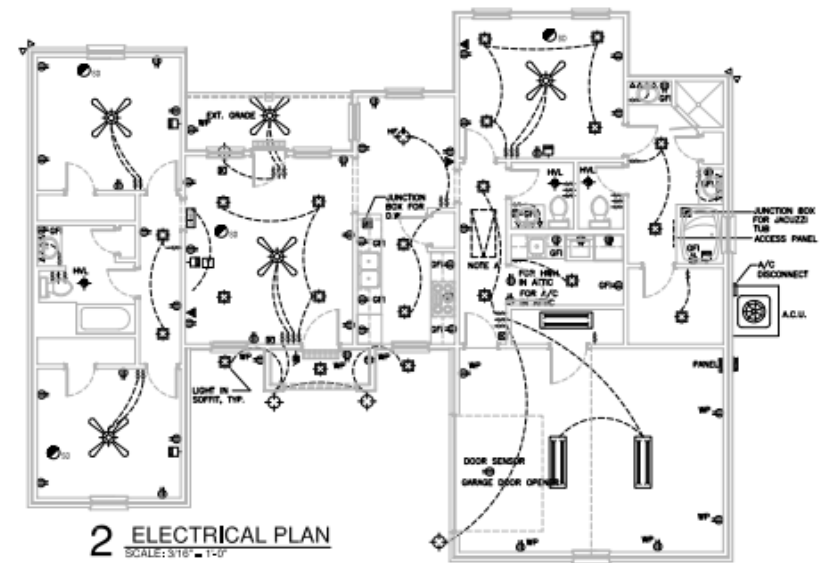


**1 MECHANICAL PLAN**  
 SCALE: 3/16" = 1'-0"

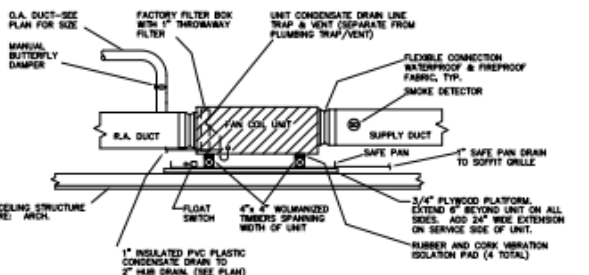
**HVAC NOTES:**  
 UNIT - HORIZONTAL UNIT  
 LEAKAGE, 4 TON ELECTRIC  
 FURNACE / AIR CONDITIONER UNIT  
 OR APPROVED EQUAL.



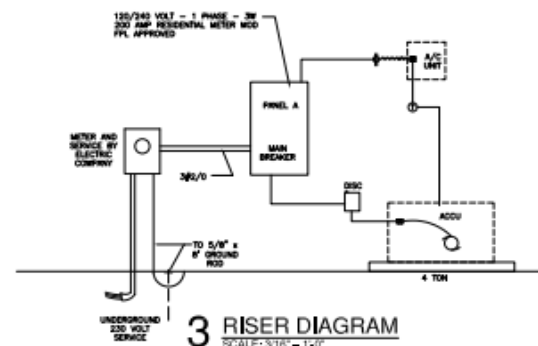
**5 WATER HEATER DETAIL**  
 SCALE: N.T.S.



**2 ELECTRICAL PLAN**  
 SCALE: 3/16" = 1'-0"



**4 HORIZONTAL FAN COIL UNIT DETAIL (TYP.)**  
 SCALE: N.T.S.



**3 RISER DIAGRAM**  
 SCALE: 3/16" = 1'-0"









# FINISH PROJECT





# FUTURE PROJECT





**CLEM JR DEVELOPMENT**  
***VILLE PLATTE, LA***

***CONTACT: CLEM LAFLEUR - DEVELOPER***

***OFFICE: 337-363-5107***

***MOBILE: 337-831-2828***

***EMAIL: CLEMLAFLEUR@CENTURYTEL.NET***

# XACTIMATE TRAINING

By: Dwon Matthews

# INTRODUCTION TO XACTIMATE

- Welcome
- Background
- Project Setup
  - Project
  - Sketch
  - Estimate Items
  - Complete



# BACKGROUND

Xactimate

# XACTIMATE

- ✓ Leading replacement cost estimating software
- ✓ Seamless integration with XactAnalysis or XactContents
- ✓ Streamline estimating claims
- ✓ Deliver professional estimates
- ✓ Provide a single platform for mobile, laptop or desktop
- ✓ Works best with Windows operating systems



# XACTIMATE

Makes estimating a property simple.



Compile  
Repair  
Information



Sketch the  
Structure



Determine  
Cost



Verify  
Accuracy of  
Estimate

# Used by the following professionals:

- ✓ Insurance Companies
- ✓ Property Adjusters
- ✓ Contractors
- ✓ Remodelers
- ✓ Mitigation Companies



# PROJECT SETUP

Xactimate





Xactimate®  
Version: 1.21.1004

Local Projects **+ New Project** Search Local Projects

	Name ▲	Claim Number	Profile	Status	Total	Created	Modified	Type
<input type="checkbox"/>	ALEXIA RICHARD		Contractor	In progress	\$23,371.61	4/30/2021 1	5/5/2021 1:2	Estimate
<input type="checkbox"/>	ALEXIA RICHARD		Carrier	In progress	\$23,371.61	9/19/2020 3	4/30/2021 2	Estimate
<input type="checkbox"/>	Allen Chapel Churc		Contractor	In progress	\$47,112.03	10/25/2021	11/3/2021 8	Estimate
<input type="checkbox"/>	Andre Ware	53-G717-2J0	Contractor	In progress	\$78,859.95	5/1/2021 2:2	9/9/2021 1:1	Estimate
<input type="checkbox"/>	Andrea Ware	BB53-g717-2J0	Contractor	In progress	\$20,191.64	3/21/2021 1	7/28/2021 2	Estimate
<input type="checkbox"/>	Andrea Ware	53-g717-2j0	Contractor	In progress	\$53,335.09	4/26/2021 8	6/8/2021 11	Estimate
<input type="checkbox"/>	Anne Bonnette	BB 1810T457P	Carrier	Upload Pending	\$113,756.61	11/16/2021	11/16/2021	Estimate
<input type="checkbox"/>	Anne Bonnette	BB 1810T457P	Contractor	In progress	\$113,756.61	5/19/2021 1	11/16/2021	Estimate
<input type="checkbox"/>	Ashley Feagan		Contractor	In progress	\$5,575.85	3/9/2021 9:3	11/12/2021	Estimate
<input type="checkbox"/>	Ashley-BB		Contractor	In progress	\$14,601.18	3/10/2021 1	5/6/2021 6:2	Estimate
<input type="checkbox"/>	BRAND, DEBBIE	42033165	Carrier	In progress	\$443,906.96	4/22/2019 7	3/10/2021 1	Estimate
<input type="checkbox"/>	Bandon		Contractor	In progress	\$89,413.26	5/13/2021 1	11/4/2021 8	Estimate
<input type="checkbox"/>	Bandon		Contractor	In progress	\$20,061.69	8/10/2021 4	8/10/2021 1	Estimate
<input type="checkbox"/>	Bandon		Contractor	In progress	\$28,126.49	3/15/2021 9	7/7/2021 8:4	Estimate
<input type="checkbox"/>	Barbara Hardy		Contractor	In progress	\$188.16	8/9/2021 9:4	10/15/2021	Estimate

Subscription expires in 25 days

# CONTROL CENTER

- Home Page
- Create new projects
- Import projects
- Export projects
- Search projects in pipeline

# NEW PROJECT SETUP

Xactimate® Version: 1.21.1004

Local Projects + New Project Search Local Projects

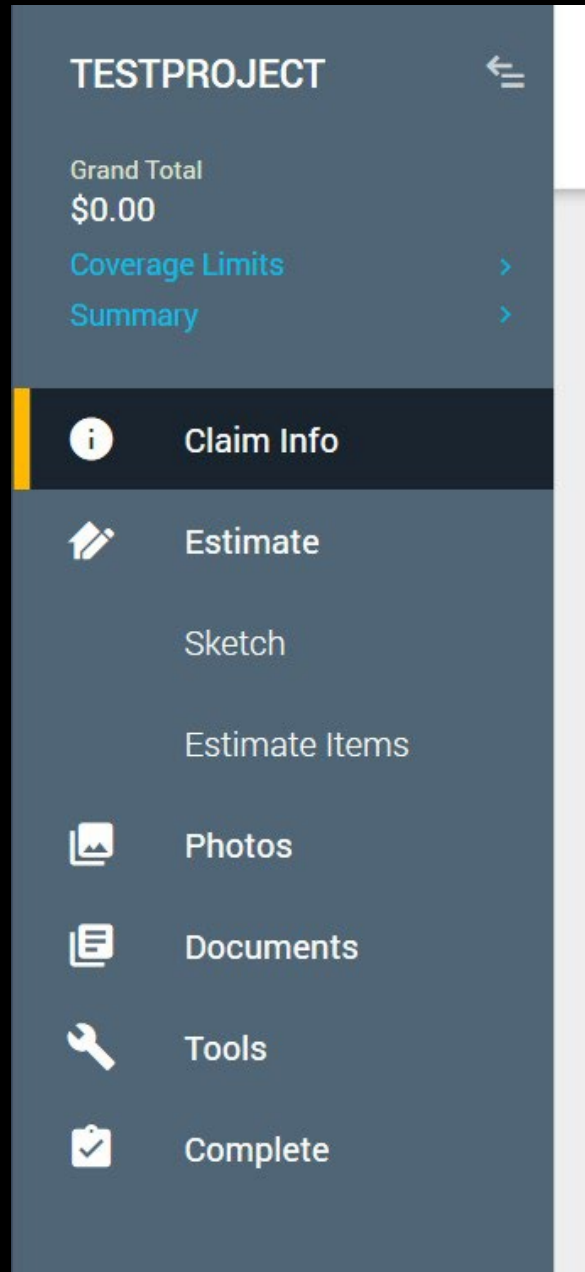
Name	Claim Number	Profile	Status	Total	Created	Modified	Type
<input type="checkbox"/> ALEXIA RICHARD		Contractor	In progress	\$23,371.61	4/30/2021 1	5/5/2021 12	Estimate
<input type="checkbox"/> ALEXIA RICHARD						4/30/2021 2	Estimate
<input type="checkbox"/> Allen Chapel Chu						11/3/2021 8	Estimate
<input type="checkbox"/> Andre Ware	2021-11-17-2248				9/9/2021 11		Estimate
<input type="checkbox"/> Andrea Ware	Created: November 17, 2021				7/28/2021 2		Estimate
<input type="checkbox"/> Andrea Ware					6/8/2021 11		Estimate
<input type="checkbox"/> Anne Bonnette		Contractor			11/16/2021		Estimate
<input type="checkbox"/> Anne Bonnette					11/16/2021		Estimate
<input type="checkbox"/> Ashley Feagan					11/12/2021		Estimate
<input type="checkbox"/> Ashley-BB					5/6/2021 6		Estimate
<input type="checkbox"/> BRAND, DEBBIE					3/10/2021 1		Estimate
<input type="checkbox"/> Bandon		Contractor	In progress	\$89,413.20	5/13/2021 1	11/4/2021 8	Estimate
<input type="checkbox"/> Bandon		Contractor	In progress	\$20,061.69	8/10/2021 4	8/10/2021 1	Estimate
<input type="checkbox"/> Bandon		Contractor	In progress	\$28,126.49	3/15/2021 9	7/7/2021 8	Estimate
<input type="checkbox"/> Barbara Hardy		Contractor	In progress	\$188.16	8/9/2021 9	10/15/2021	Estimate

Subscription expires in 25 days

10:50 PM 11/17/2021 71°F

- Name project
- Select Contractor or Carrier
- Input Notes (Type of job)
- Click Create

**Some tabs have subcategories within the tab i.e. Estimate**



# A NEW PROJECT

## Tabs to Complete:

### Claim Info

- Input basic claim information using the Loss Notice and Homeowner's Policy

### Sketch

- Create a visual diagram of the property

### Estimate Item

- Determine estimated replacement cost

### Documents

- Finalize the report

# CLAIM INFO

## Insured Info (Customer)

- Name
- Email

TESTPROJECT

Grand Total  
\$0.00

Coverage Limits  
Summary

Claim Info

Estimate

Photos

Documents

Tools

Complete

Save and Exit

Xactimate® is a registered trademark of Xactware Solutions, Inc.

Claim Info ✓ Saved

**Insured Info** Parameters

**Insured Info**

Name \_\_\_\_\_ Email \_\_\_\_\_

Address Type  
**Property**

Street \_\_\_\_\_ City \_\_\_\_\_ State Select option \_\_\_\_\_ Zip Code \_\_\_\_\_

Country **USA** Latitude **0.000000** Longitude **0.000000**  Primary Address

Phone Type **Home** Phone # **( ) -** Ext. \_\_\_\_\_  Primary Phone

**Dates (Central Standard Time)**

Date Entered **11/18/2021 8:18 AM** Date Assigned **M/D/YYYY H:MM AM/PM** Est. Completed **M/D/YYYY H:MM AM/PM** Job Completed **M/D/YYYY H:MM AM/PM**

**Personnel**

Estimator \_\_\_\_\_ Reference \_\_\_\_\_

# CLAIM INFO

## Parameters

- Pricelist

The screenshot displays the Xactimate software interface. On the left, a sidebar shows the claim number '1914CR130' and a 'Grand Total' of '\$85,185.01'. The main window is titled 'Claim Info' and has a 'Parameters' tab selected, which is highlighted with a red box and a red arrow pointing to it. A 'Request price list by...' dialog box is open in the center, allowing the user to specify search criteria. The dialog box includes fields for 'Location / Name', 'Country' (United States), 'State' (Louisiana), 'City' (Baton Rouge), 'Date' (11/17/2021), 'Language' (English), and 'Profile' (No specific profile). At the bottom of the dialog box are 'CANCEL', 'DOWNLOAD', and 'DONE' buttons. The background interface shows various tabs like 'Pricing', 'Price List Filter', and 'Additional Charges'.

# CLAIM INFO

## Parameters

- Pricelist

LAMALOLOA

Grand Total  
\$2,451,088.66

Coverage Limits  
Summary

Claim Info

Estimate

Photos

Documents

Tools

Complete

Save and Exit

Claim Info ✓ Saved

Insured Info Parameters

Select a price list

None

Location / Name	Date	Language	Type
Hawaii Outer Island, HI	2021 May 01	English (US)	Xactware
Houma, LA	2021 Oct 01	English (US)	Xactware
Lake Charles, LA	2021 Aug 01	English (US)	Xactware
Lake Charles, LA	2021 Feb 01	English (US)	Xactware
Lake Charles, LA	2021 Jun 01	English (US)	Xactware
Lake Charles, LA	2021 May 01	English (US)	Xactware
Lake Charles, LA	2020 Nov 01	English (US)	Xactware
Lake Charles, LA	2020 Oct 01	English (US)	Xactware

REQUEST PRICE LIST DELETE DONE

Max Depreciation  
100%

Depreciation (Default)  
Recoverable

Depreciate by  
Percent

# CLAIM INFO

## Parameters

- Overhead & Profit - 10/10

The screenshot displays the 'Claim Info' parameters for claim 1914CR130. The interface includes a sidebar with navigation options: Claim Info, Estimate, Photos, Documents, Tools, and Complete. The main content area is titled 'Claim Info' and shows 'Unsaved changes'. The 'Parameters' tab is active, displaying several sections:

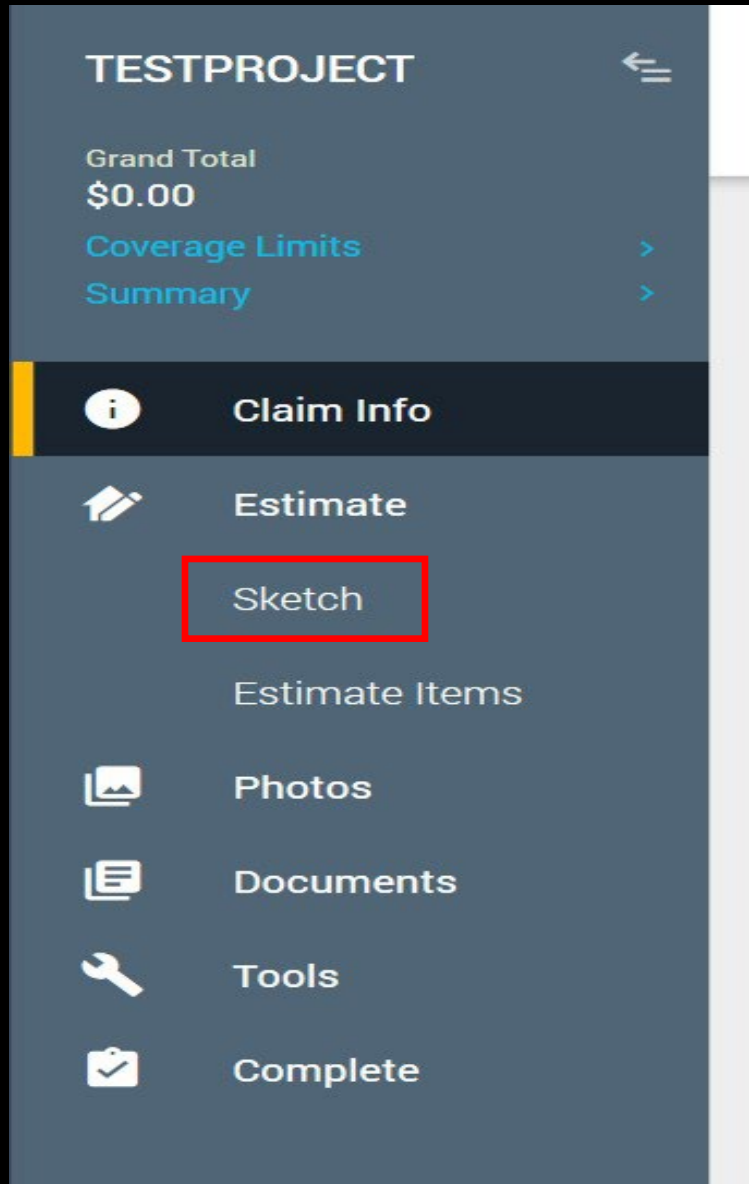
- Add Ons:** Includes 'Show Tags' (checked), 'Default Tags', 'Distribute Market Conditions' (unchecked), 'Salvage/Restored', 'Labor Burden', 'Sales Tax', and 'Additional Charges'.
- Depreciation Options:** Includes 'Depreciate Material' (checked), 'Depreciate Non-Material' (checked), 'Depreciate Removal' (unchecked), 'Depreciate Overhead and Profit' (unchecked), and 'Depreciate Sales Tax' (checked). Below this are fields for 'Max Depreciation' (100%), 'Depreciation (Default) Recoverable' (dropdown), and 'Depreciate by' (dropdown).
- Overhead and Profit (O&P):** This section is highlighted with red boxes. It shows 'Overhead' set to 10.0% and 'Profit' set to 10.0%. There is also a checkbox for 'Cumulative Overhead and Profit' which is unchecked.
- Report Text:** Includes a 'Company Header' field with the value 'T4D'.

At the bottom left, there is a 'Save and Exit' button and a small copyright notice: 'Xactimate® is a registered trademark of Xactware Solutions, Inc.'

# BUILDING THE ESTIMATE

Xactimate





# ESTIMATE

Sketch – To build Estimate tree

- Sketch Roof
- Sketch Rooms

# Roof Sketch

Select type of roof (hip or gable)

TESTPROJECT

Grand Total \$0.00

Coverage Limits Summary

Claim Info

Estimate

Sketch

Estimate Items

Photos

Documents

Tools

Complete

Save and Exit

Xactimate® is a registered trademark of Xactware Solutions, Inc.

Sketch Saved

Tools Options XactSe Annotation

Room Roof Deck Doorway Missing Wall Break Flip Rotate Orientation Block Line Copy from Underlay

Wall Staircase Fence Window Snap Line Vertex Scale Flooring Orientation Area Point

Search

FACE	SQ FT	# SQs	Slope - Rise / 12
F1 (A)	75.89	0.76	4.00
<b>Roof1</b>	75.89	0.76	4.00
F2 (B)			
<b>Estimated Total:</b>	<b>151.79</b>	<b>1.52</b>	

SKETCH1 Main Level

View

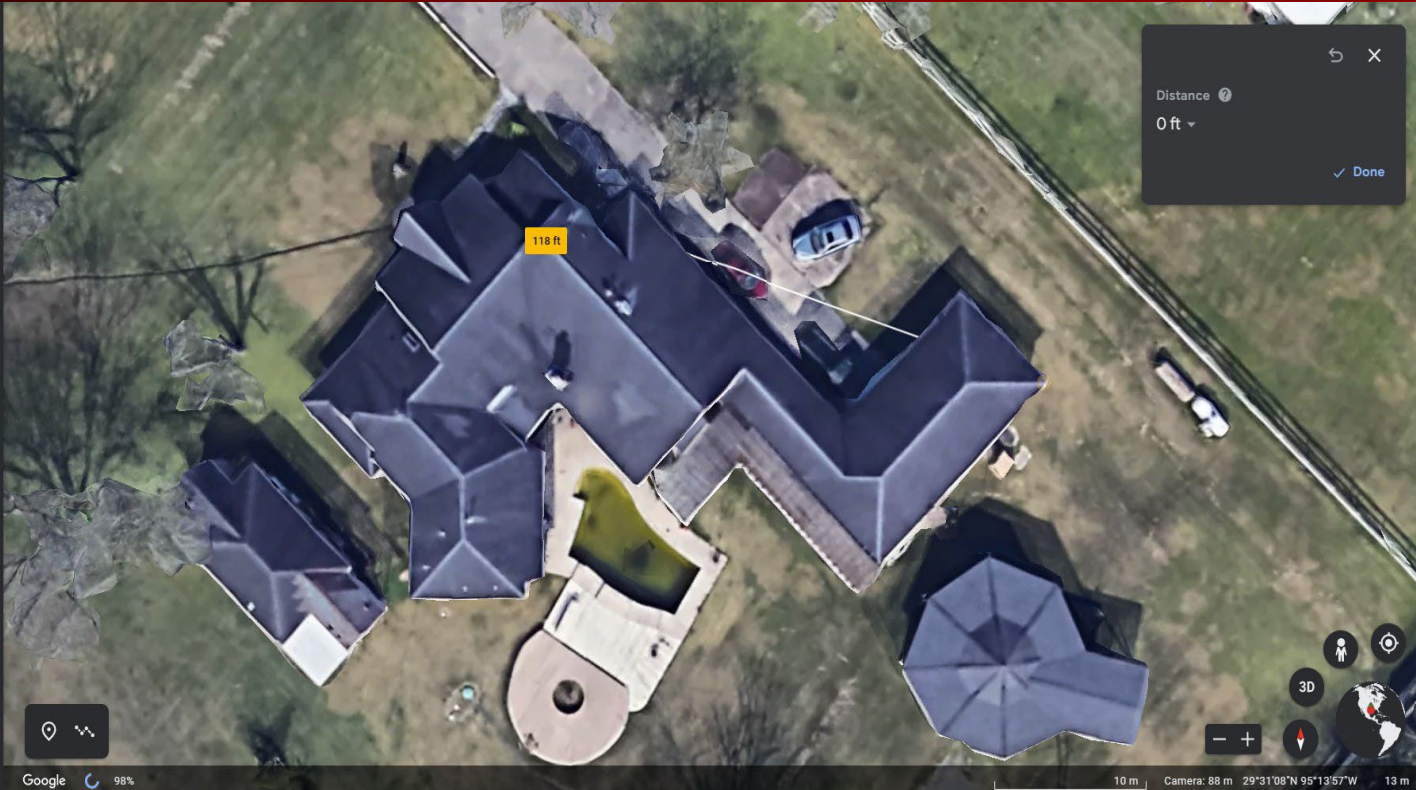
Items

#	Cat	Sel	Act	Notes	Description	Calc	Quantity	Unit	Unit Price	Sales Tax	RCV	Depreciation	ACV
---	-----	-----	-----	-------	-------------	------	----------	------	------------	-----------	-----	--------------	-----

Quantity calculated sketched.

Sketch roof based on measurements

# ROOF SKETCH



**Use Google Earth to Measure Your Roof**

- Create a new folder for each item you sketch:
  - Roofs
  - Exterior Elevations
  - Interior Rooms
  - Detached Structures
- Roof Sketching – Know the different roof types:
  - Gable
  - Hip
  - Flat/Shed
  - Gambrel
  - Partial Hip

# Roof Properties

Detailed info - slope, overhang, ridge, etc.

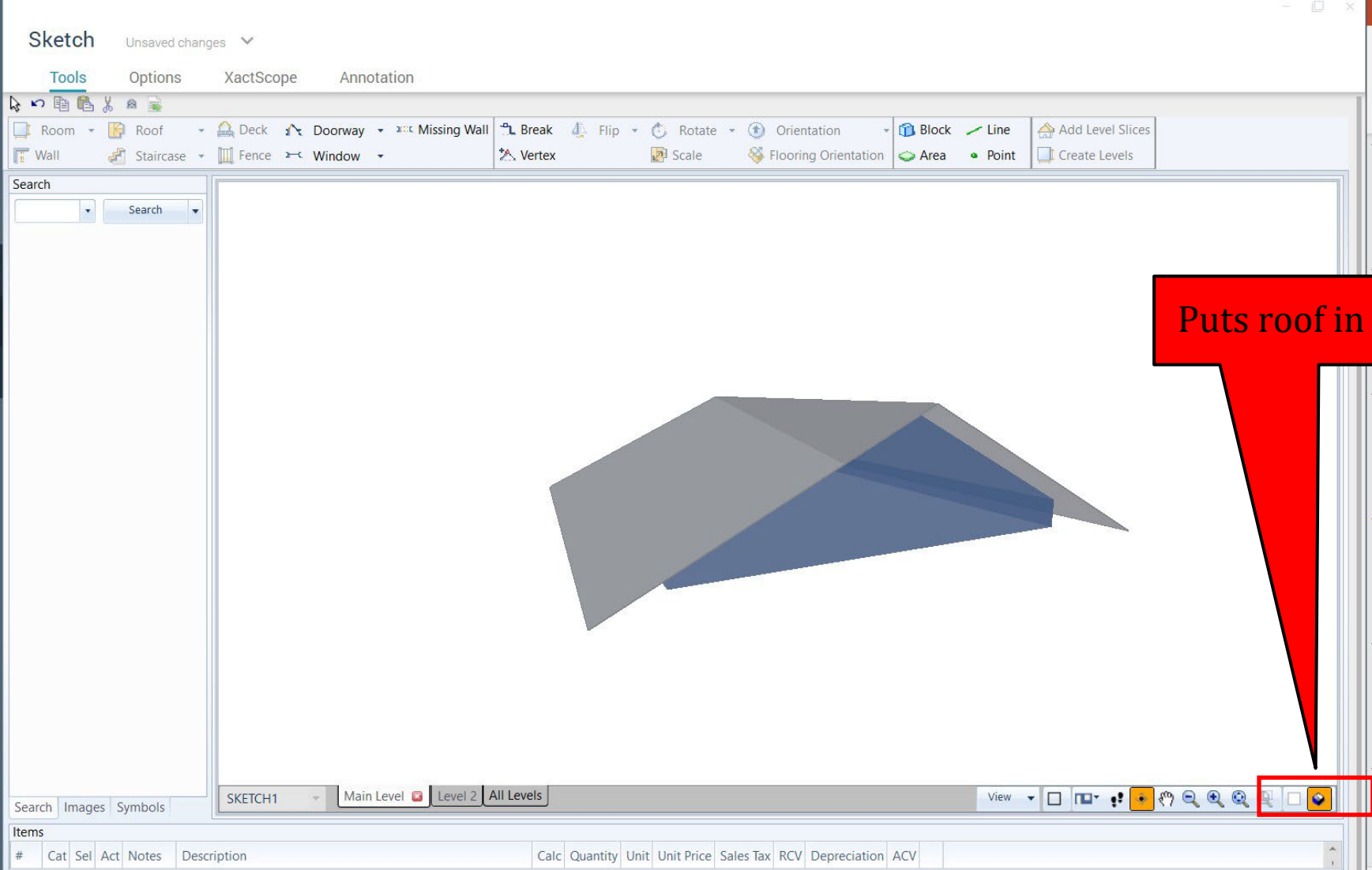
The screenshot displays the 'Roof Properties - Roof1' panel with the following details:

- General:** Name: Roof1, Grouping Code: ROOF1, Extend Roof Walls: Yes, Roof Wall Height: 0" (Auto), Show Label: Yes.
- Dimensions:** Roof Type: Gable, Eave Heights: A=0", B=0", Overhang - Eave: 16", Overhang - Rake: 12", Rafter - A: 6' 3 7/8", Rafter - B: 6' 3 7/8", Ridge: Ht=2', A=6", B=6", Roof Span: 12', Slope - Rise / 12: A=4", B=4".
- Display:** Color: 0, 140, 143, 150; Texture: None.
- Construction:** Roof Framing: None, Roof Wall: None.
- Variables:** All Variables: Click for all variables; EAVE: 24 ft; F1SF: 75.89 ft<sup>2</sup>; F1SQ: 0.76 sq; F2SF: 75.89 ft<sup>2</sup>; F2SQ: 0.76 sq; FLASH: 0 ft; HIP: 0 ft; P: 49.3 ft; R: 12 ft; RAKE: 25.3 ft; SF: 151.79 ft<sup>2</sup>.

The 2D diagram shows a gable roof layout with a 12' span and 4:12 slope. The roof is divided into two faces, F1 (A) and F2 (B). A table summarizes the area and slope data:

FACE	SQ FT	# SQs	Slope - Rise / 12
F1	75.89	0.76	4.00
F2	75.89	0.76	4.00
<b>Estimated Total:</b>	<b>151.79</b>	<b>1.52</b>	

# Roof - In 3D



# Room Sketch

Select to sketch room

The screenshot displays the Sketch software interface. The top menu bar includes 'Sketch', 'Tools', 'Options', 'Sketchscope', and 'Annotation'. The 'Tools' ribbon contains various drawing tools, with the 'Room' tool highlighted by a red box and a callout. The main workspace shows a floor plan sketch of a bedroom and livingroom with dimensions: 12' 6" for each room's width, 12' for the livingroom's depth, and 12' 6" for the bedroom's depth. A red callout points to the 'Room Properties' panel on the right, which lists settings for 'Bedroom, Livingroom'.

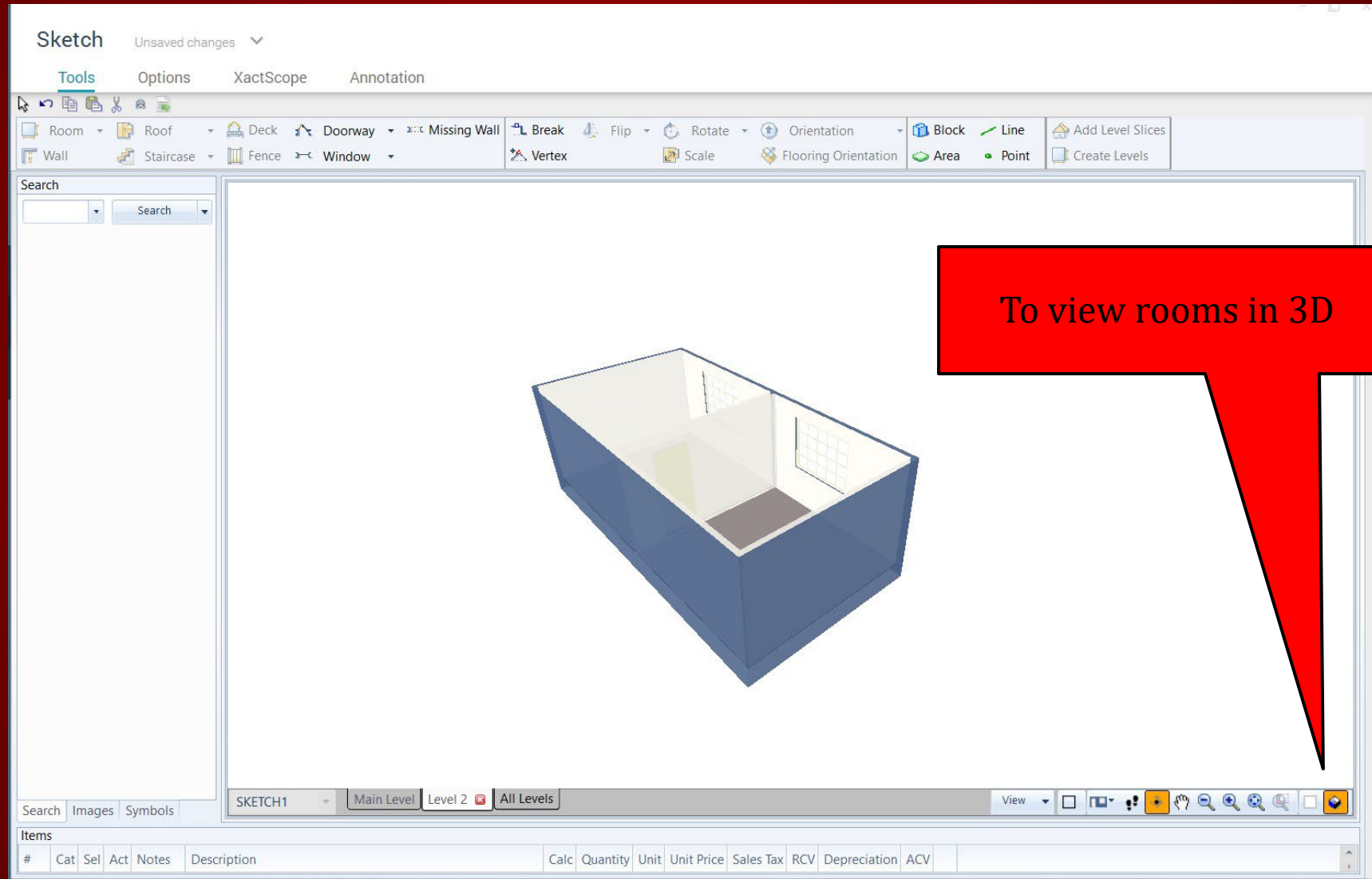
**Room Properties - Bedroom, Livingroom**

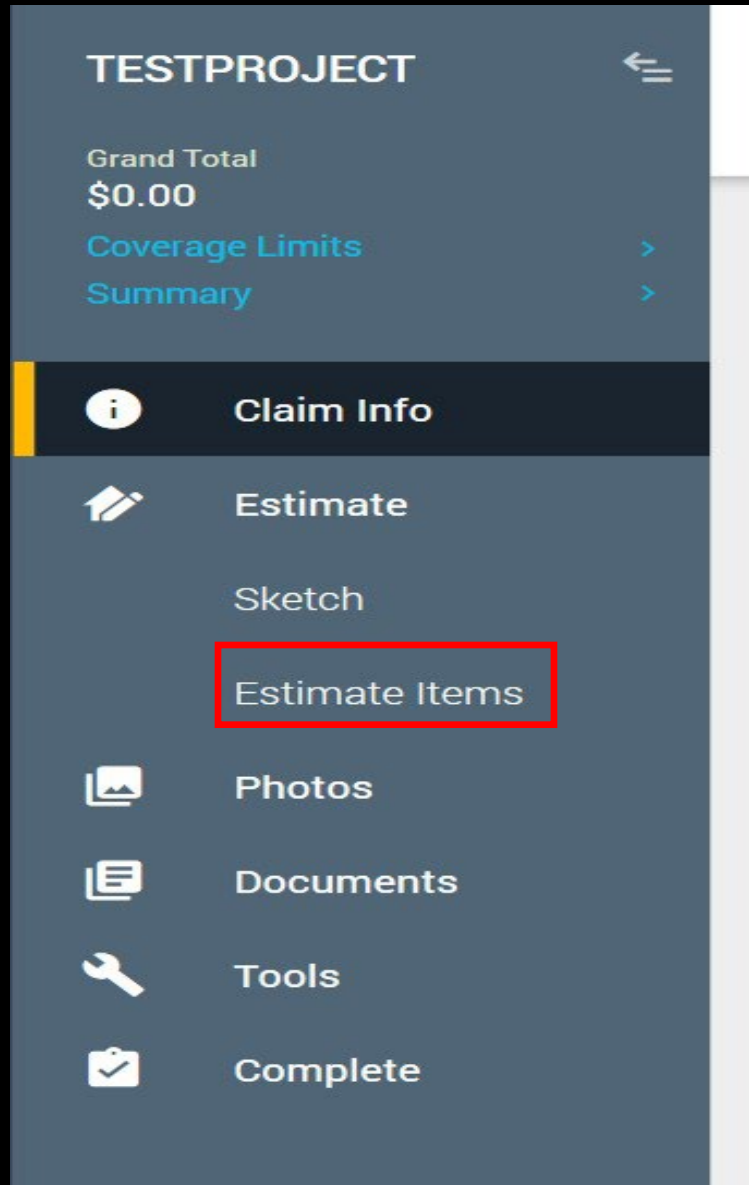
Category	Property	Value
General	Show Label	Yes
	Type	<multiple>
Dimensions	Floor Height	0"
	Relation to Level	Above
	Wall Thickness	4"
Ceiling	Ceiling Type	Box
	Ceiling Height	8'
Display	Ceiling Color	209, 215, 217
	Ceiling Texture	None
	Floor Color	130, 120, 120
	Floor Texture	None
Construction	Floor	None
	Footing	None
	Wall	None

Level 2

Room properties - wall framing & height; ceiling type & height; etc.

# Room Sketch 3D





# ESTIMATE

Estimate Items – Add line items



# CLAIM INFO

Coverage/Loss

# Claim Info: Coverage/Loss

The next section is  
“Coverage/Loss”

Project Claim Info Sketch Estimate Items Complete Print Save & Ext Help

Insured Info Coverage/Loss Parameters Loss Recap Report Management

**Loss Information**

Claim Number:  Adj. File Number:

Policy Number:

Type of Loss:

Cause of Loss:

Cat Code:

Policy Dates:  to  Policy Type: Homeowner

Initial Coverage:

Form Numbers:

Apply Deductible

Across all Coverages

Coverage Specific

**Coverages**

Coverage	Policy Limit	Apply To	ITV	Reserve	Options
Dwelling	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Other Structures	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Contents	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Loss of Use	\$0.00			\$0.00	

[Add Coverage](#)  Apply Limits

Language: English (United States) Profile: Carrier Status: In Progress April 15, 2017 Sub Total: \$0.00 Inspection Grand Total: \$0.00

You can find the information on the “Loss Notice” or  
“Declaration Page” found in the claim management system.

# Claim Info: Coverage/Loss

**Loss Information**

Claim Number: 12345678  
Policy Number: 20048858321  
Type of Loss: HURRICANE  
Cause of Loss: Other  
Cat Code: IRMA  
Policy Dates: 03/30/2017 to 03/30/2018  
Initial Coverage: [ ]  
Form Numbers: [ ]

Adj. File Number: 13-6666

Policy Type: Homeowner

Apply Deductible:  
 Across all Coverages \$1,000.00  
 Coverage Specific

**Coverages**

Coverage	Policy Limit	Apply To	ITV	Reserve	Options
Dwelling	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Other Structures	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Contents	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Loss of Use	\$0.00			\$0.00	

[Add Coverage](#)  Apply Limits

Language: English (United States) | Profile: Camer | Status: In Progress | November 21, 2017 | Sub Total: \$0.00 | [Inspection](#) | [Grand Total: \\$0.00](#)

**Callouts:**

- If it is not included, click "other" & put a short description
- The IA Firms Invoice Number
- Policy Start and Expiration Dates
- Input the deductible
- Review the Declaration page of the policy to input the correct coverage names and limits
- Review the policy to determine if the coverage is ACV or RCV

# ADD COVERAGE

**Loss Information**

Claim Number: 12345678      Adj. File Number: 13-6666

Policy Number: 20048858321

Type of Loss: HURRICANE      Hurricane

Cause of Loss: Other      IRMA

Cat Code:

Policy Dates: 03/30/2017 to 03/30/2018      Policy Type: Homeowner

Initial Coverage:

Form Numbers:

Apply Deductible

Across all Coverages      \$1,000.00

Coverage Specific

**Coverages**

Coverage	Policy Limit	Apply To	ITV	Reserve	Options
Dwelling	\$212,000.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Other Structures	\$21,200.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Contents	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
<input type="text"/>	\$0.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Loss of Use	\$0.00			\$0.00	

[Add Coverage](#)       Apply Limits

A blank blue box will appear. Click it to select coverage from the drop-down selection

Click "Add Coverage" to add additional coverage

# ADD COVERAGE

**Loss Information**

Claim Number: 12345678  
Policy Number: 20048858321  
Type of Loss: HURRICANE  
Cause of Loss: Other  
Cat Code:  
Policy Dates: 03/30/2017  
Initial Coverage:  
Form Numbers:

**Coverages**

Coverage	Type
Dwelling	Structural
Other Structures	Other Structures
Contents	Contents
ALE	Contents
Bodily Injury & Personal Propert...	Contents
Comprehensive Mobile Home	Structural
Comprehensive Unattached A...	Other Structures
Coverage A - Dwelling	Structural
Coverage B - Other Structures	Other Structures
Endoments Conts	Contents
Incr Limits Building - Named Pe...	Structural
Law and Ordinance	Structural
Personal Property	Contents
Scheduled Fam Personal Prop...	Other Structures
Screened Enclosures and Car...	Other Structures

OK  
Cancel  
**Add...**  
Edit...  
Delete  
Options

**Coverages**

Coverage	Reserve	Options
Dwelling	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Other Structures	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Contents	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Loss of Use	\$0.00	\$0.00

[Add Coverage](#)  Apply Limits [Print](#) [Save & Exit](#) [Help](#) [Grand Total: \\$0.00](#)

# The Complete "Coverage/Loss" Section

Project Claim Info Sketch Estimate Items Complete Print Save & Exit Help

Insured Info Coverage/Loss Parameters Loss Recap Report Management

---

### Loss Information

Claim Number:	<input type="text" value="2730871"/>	Adj. File Number:	<input type="text" value="13-6581"/>
Policy Number:	<input type="text" value="2004452229"/>		
Type of Loss:	<input type="text" value="WATER"/> Water Damage		
Cause of Loss:	<input type="text" value="Other"/> <input type="text" value="Water Heater Leak In Attic"/>		
Cat Code:	<input type="text"/>		
Policy Dates:	<input type="text" value="11/29/2016"/> to <input type="text" value="11/29/2017"/>	Policy Type:	<input type="text" value="Homeowner"/>
Initial Coverage:	<input type="text"/>	Apply Deductible	<input checked="" type="radio"/> Across all Coverages <input type="radio"/> Coverage Specific <input type="text" value="\$1,000.00"/>
Form Numbers:	<input type="text"/>		

### Coverages

Coverage	Policy Limit	Apply To	ITV	Reserve	Options
Dwelling	\$250,000.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Other Structures	\$25,000.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Personal Property	\$175,000.00	R/C	0%	\$0.00	<a href="#">Add Options</a> <a href="#">Remove</a>
Loss of Use	\$50,000.00			\$0.00	

[Add Coverage](#)  Apply Limits

Language: English (United States) | Profile: Carrier | Status: In Progress | April 15, 2017 | Sub Total: \$9,344.74 | [Inspection](#) | [Grand Total: \\$10,484.97](#) | [Coverage Limits](#)

# CLAIM INFO

Parameters

# Claim Info: Parameters

Follow three steps when completing this section.

The screenshot shows the 'Parameters' section of a software interface. The 'Pricing' section includes dropdown menus for 'Checkpoint Price List', 'Price List', and 'Tax Jurisdiction', and radio buttons for 'Activity (Default)' (Use price list defaults, Select) and 'Repaired By (Default)' (Contractor, Homeowner). The 'Add Ons' section has checkboxes for 'Show Tags', 'Distribute Market Conditions', and 'Include Advance Payments', and buttons for 'Salvage/Restored', 'Labor Burden', 'Sales Tax', 'Additional Charges', and 'Advance Payments'. The 'Depreciation Options' section has checkboxes for 'Depreciate Material', 'Depreciate Non-Material', 'Depreciate Removal', 'Depreciate Overhead and Profit', and 'Depreciate Sales Tax'. The 'Overhead and Profit' section has input fields for 'Overhead' and 'Profit', and a checkbox for 'Cumulative Overhead and Profit'. The 'Report Text' section has a 'Company Header' dropdown and text boxes for 'Opening Statement' and 'Closing Statement', each with 'Model' and 'Edit' buttons.

**1A** → The next section is "Parameters"

Xactimate determines pricing for materials based on state & zip code

**1B** →

The IA firm will provide specific guidelines for this section

**2A** →

10% applies to both when a general contractor is needed

**2B** →

**3A** →

Creates logo and IA firm header

**3B** →

Price List

Language: English (United States) Profile: Carrier Status: In Progress April 15, 2017 Sub Total: \$0.00 Inspection Grand Total: \$0.00



# Step 1A: Pricing – Checkpoint Price List

Click here to select "Smartlist"

Click "Download" after you input the zip code

Transfer Type

- Folder
- XactAnalysis
- Cloud

Action

- Request price list(s) from XactAnalysis
- Send data via XactAnalysis

Retrieve data

Please select a price list area for your request.

Current Xactware Price List

Country: USA

City:

State/Province:

City:

Zip/Postal Code: 80216

Download Cancel

Repaired By (Default)

- Contractor
- Homeowner

80216-2532 Price Lists

OK

Cancel

View

Report Text

Company Header:

Opening Statement

Model

Edit

Closing Statement

Model

Language: English (United States) Profile: Carrier Status: In Progress November 21, 2017 Sub Total: \$0.00 Inspection Grand Total: \$0.00

# Step 1B: Pricing – Tax Jurisdiction

The screenshot displays a software interface with a 'Pricing' section on the left and a 'Sales Tax Jurisdictions' dialog box in the center. The dialog box contains a list of jurisdictions with the following entries:

Jurisdiction
No Selection
Existing Jurisdiction (7.65%)
7.65%

A callout box with a black border and a yellow background points to the '7.65%' entry. The text inside the callout reads: "Select the highest percentage available. Do not select the 'Commercial' option unless it is a commercial claim."

The background interface includes a 'Pricing' section with fields for 'Checkpoint Price List', 'Price List', 'Tax Jurisdiction' (set to 7.65%), and 'Price List Filter'. Below this is an 'Add Ons' section with checkboxes for 'Show Tags', 'Distribute Market Condition', and 'Include Advance Payment'. A 'Depreciation Options' section includes checkboxes for 'Depreciate Material', 'Depreciate Non-Material', 'Depreciate Removal', 'Depreciate Overhead', and 'Depreciate Sales Tax'. The 'Report Text' section has a 'Company Header' field. On the right side, there are fields for 'Required By (Default)', 'Contractor', 'Homeowner', and 'New Construction' checkbox. At the bottom right, there are 'Model' and 'Edit' buttons.

# Step 3A: Report Text – Company Header

**Pricing**


Add Company Header Information

Profile:

Code:

Company Name:

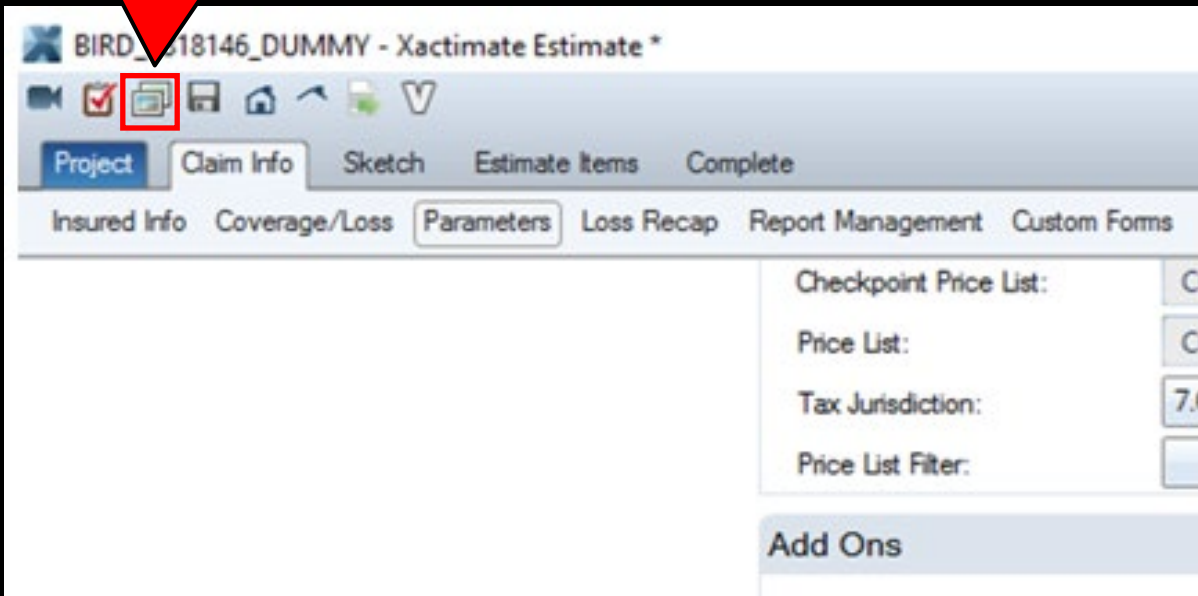
Info:

Image: 

Personal

OK Cancel

Click here to upload photos taken during the inspection



## PHOTO REPORT

Parameters

**Photos should be labeled and in the correct order!**

# THREE EASY STEPS TO UPLOAD PHOTOS

## Step One

- Create a folder on desktop
- Name folder by insured's:
  - Last Name
  - Claim Number

## Step Two

- Select the correct folder
- Download pictures from camera &/or phone
- Upload photos to folder

## Step Three

- Download pictures into Xactimate

# Uploading Photos

## Step One

- Create a folder on desktop
- Name folder by insured's:
  - Last Name
  - Claim Number

## Step Two

- Select the correct folder
- Download pictures from camera &/or phone
- Upload photos to folder

## The Proper Order for Photos :

- *Risk Overview*
- *Risk Location*
- *Roof (Full 360)*
- *Elevations (Full 360)*
- *Interior* (Inspect ALL rooms – 2 pics minimum per room if no damage)
- *Other Structures – Detached Garage, Fence, Detached Shed, Etc.*
- *Personal Property – (If applicable)*

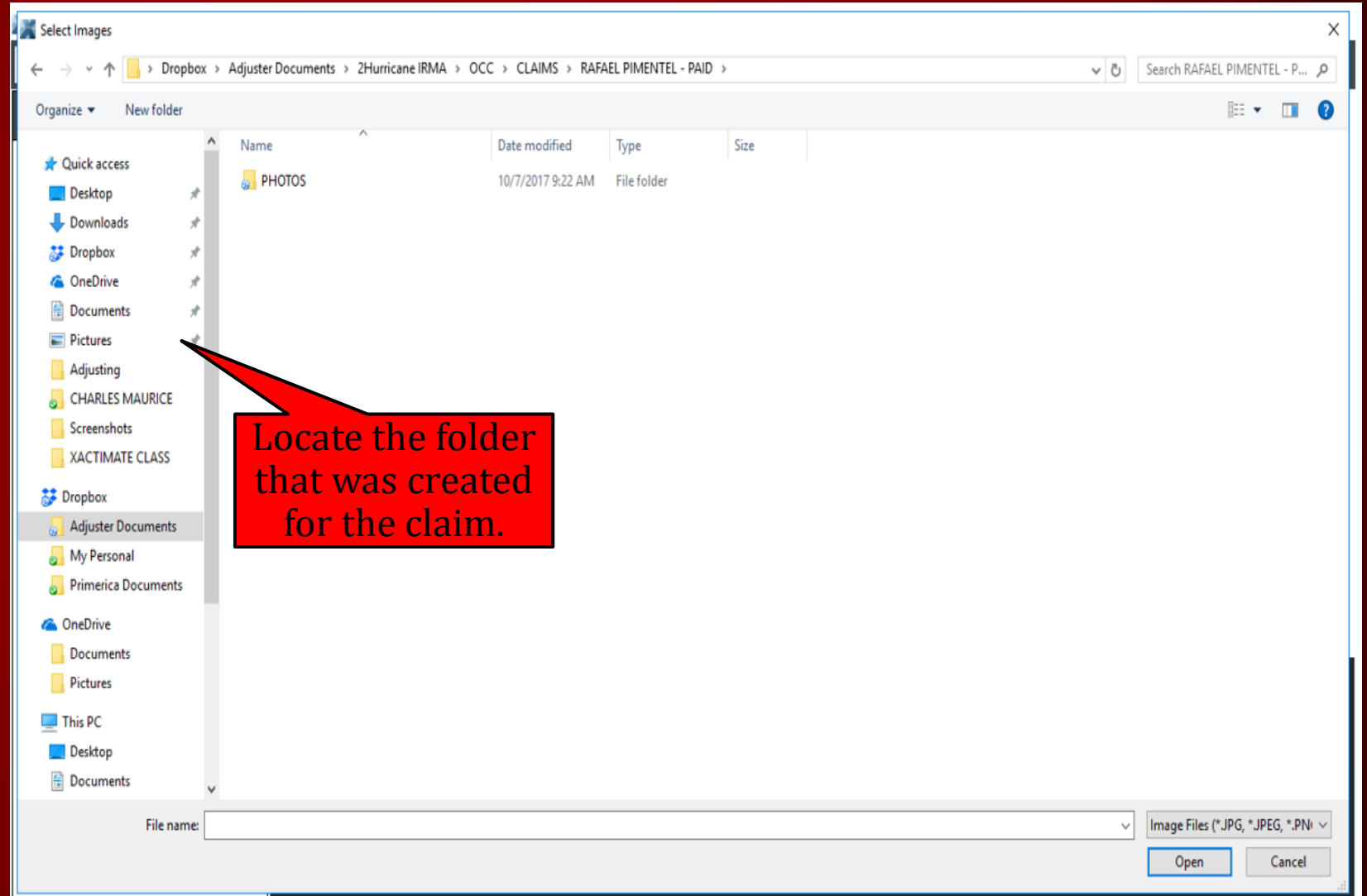
**Photos should be labeled and in the correct order!**

# Downloading Photos



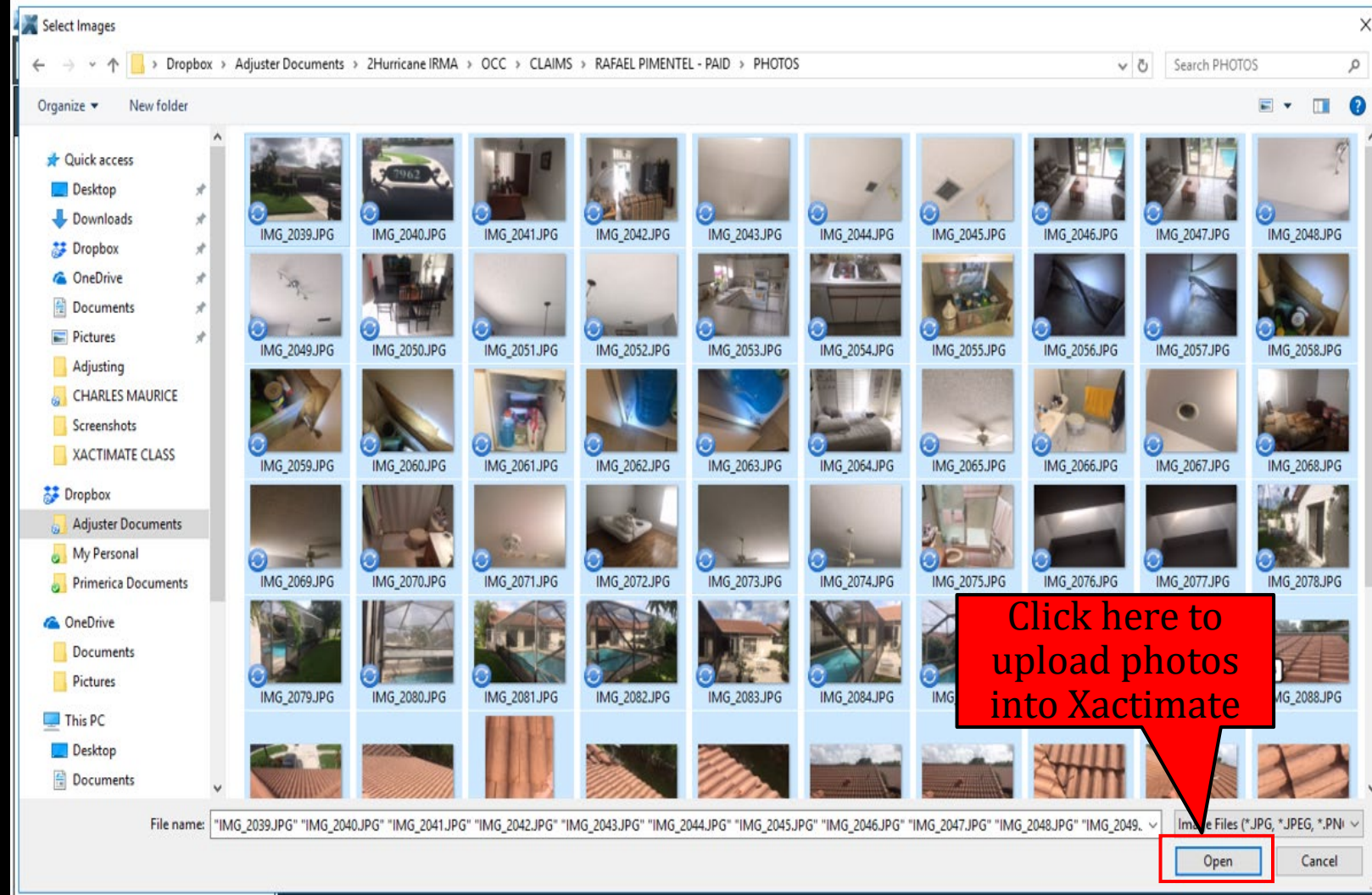
Step Three

- Download pictures into Xactimate



# Select Images

- Click on folder to display pictures taken at time of inspection.
- Click & Hold the “CTRL” button and the click “A” (at the same time) to select all pictures at one time.





# Complete The Photo Report

The screenshot displays the 'Digital Images' application interface. On the left is a sidebar with a folder tree under 'Unassigned', including 'All Images', 'Unassigned (75)', 'Estimate Folders', 'Personal Folders', and 'Vendor'. The main area shows a grid of 24 photo thumbnails, each with a label like '141-IMG\_2039'. At the bottom, a metadata entry form is visible with fields for 'Image Name', 'Date Taken', 'Taken By', and 'Description'. There is also an 'Exclude From Reports' checkbox and 'Thumbnail Size' controls.

Labels in callout boxes point to specific fields in the metadata form:

- A callout box on the left points to the 'Image Name' field, containing the text: "Labeled as specific slope, elevation, room etc."
- A callout box points to the 'Date Taken' field, containing the text: "The date inspection was completed"
- A callout box points to the 'Taken By' field, containing the text: "Name of adjuster who completed inspection"

SKETCH

# Sketch Tab

The screenshot displays the software interface with the **Sketch** tab selected in the top menu. A red box highlights the **Sketch** tab, with a callout pointing to it that says "The next tab is 'Sketch'". Another red box highlights the **Level Properties** dialog, with a callout pointing to the **Name** field that says "Type the name of folder here". The dialog shows the following information:

Name	Code	Elevation
Level 2	LEVEL_2	109'
Coverage A - ...	COVERAGE_A_...	100'

The main workspace shows a floor plan with rooms labeled: **Living Room**, **Kitchen**, **Bathroom**, and **Area4 (A1)**. A north arrow is visible on the right side. The bottom status bar shows: **SKETCH1** | Coverage A - Dwelling | Level 2 | View | [Icons]

**Items**

#	Cat	Sel	Act	Notes	Description	Coverage	Calc	Quantity	Unit	Unit Price	Sales Tax	RCV	Depreciation	ACV

**Language:** English (United States) | **Profile:** Carrier | **Status:** In Progress | **April 15, 2017** | **Sub Total:** \$9,344.74 | [Inspection](#) | **Grand Total:** \$10,484.97 | [Coverage Limits](#)

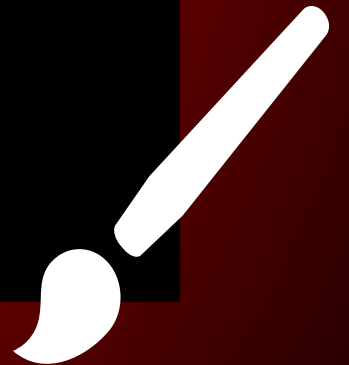
**A sketch is not necessary for the area, if repairs or replacements are not included in the estimate.**

# SKETCHING RULES



**DO NOT SKETCH ROOF, ELEVATIONS, ROOMS  
IN THE SAME FOLDER.**

- Create a new folder for each item you sketch:
  - Roofs
  - Exterior Elevations
  - Interior Rooms
  - Detached Structures
- Roof Sketching – Know the different roof types:
  - Gable
  - Hip
  - Flat/Shed
  - Gambrel
  - Partial Hip



# Sketch Tab

The screenshot shows a software interface with several tabs: Project, Claim Info, Sketch, Estimate Items, and Complete. The 'Estimate Items' tab is highlighted with a red box. Below the tabs is a toolbar with various tools like Room, Roof, Deck, Doorway, Missing Wall, Break, Flip Horizontal, Rotate, Orientation, Block, Line, Copy from Underlay, Wall, Staircase, Fence, Window, Snap Line, Vertex, Flip Vertical, Scale, Flooring Orientation, Area, and Point. A search panel on the left contains a search bar and links for 'Search Price List - CASI8X MAR...', 'Search Price List by Division', 'Reference Search', 'Similar-Item Search', and 'Related-Item Search'. The main workspace is empty. At the bottom, there is a folder navigation bar with 'SKETCH1', 'Coverage A - Dwelling', 'Exterior', 'Interior', and 'Other Structures'. A red box highlights the 'Other Structures' folder. To the right of the folder bar is a 'View' dropdown and a 'Zoom In' button. A red box highlights the 'Zoom In' button. At the bottom of the interface is a table with columns: #, Cat, Sel, Act, Notes, Description, Coverage, Calc, Quantity, Unit, Unit Price, Sales Tax, RCV, Depreciation, ACV. A yellow callout box is positioned over the table area.

Move to the "Estimate Items" tab next

Click here to add arrows & text to the sketch

Xactimate allows multiple folders

Click here to use the "Zoom Out" & "Zoom In" feature

Only folders with sketched items will appear in the "Estimate Item" tab and the folders will appear in the same order.

Language: English (United States) Profile: Carrier Status: In Progress November 29, 2017 Sub Total: \$9,344.74 Inspection Grand Total: \$10,484.97 Coverage Limits

ESTIMATE ITEMS

# Estimate Items Tab

The next tab is "Estimate Items"

Here is an example of a tree folder

Grouping

Group	Subtotal	# Items
BIRD_2818146_DUMMY		
Dwelling - Roof		
Roof		
Dwelling - Exterior		
Front Elevation		
Left Elevation		
Rear Elevation		
Right Elevation		
Dwelling - Interior		
Bedroom 1		
Bathroom 1	\$2,339.36	6
Kitchen	\$2,654.91	7
Living Room	\$1,051.85	2

Search

Home > Price List > Reference

Similar Related

BASEMENT BATHROOM BEDROOM EXTERIOR LAUNDRY OFFICE/DEN FLOOR

FRAMING GAME ROOM GARAGE KITCHEN-DINING LIVING ROOM NURSERY PLAYROOM

Quick Entry

Misc. Item Attachments Salvage/Restored

OK Cancel

Cat: Sel: Act:

Desc:

Calc: = 0.00 @ 0.00 = \$0.00

Cov:

#	Cat	Sel	Act	Notes	Description	Coverage	Calc	Quantity	Unit	Unit Price	Sales Tax	RCV	Depreciation	ACV
---	-----	-----	-----	-------	-------------	----------	------	----------	------	------------	-----------	-----	--------------	-----

Language: English (United States) Profile: Carrier Status: In Progress November 29, 2017 Sub Total: \$6,046.12 Inspection Grand Total: \$6,285.47





# Three easy steps to create a "General" folder

The screenshot shows a software interface with a 'Grouping' pane on the left and a search results grid on the right. The 'Grouping' pane lists a tree structure under 'BIRD\_2818146\_DUMMY', including 'Dwelling - Roof', 'Dwelling - Exterior', and 'Dwelling - Interior'. A red box highlights the 'Debris Removal' folder, with a red arrow pointing to it from the text 'New Folder'. The search bar at the top right contains the text 'EXTERIOR' and is also highlighted with a red box. The search results grid displays various room categories with corresponding images, and the 'EXTERIOR' category is highlighted with a red box. A yellow callout box at the bottom right contains the text: 'When searching for specific line items use the search box or click on a specific image picture.'

Group	Subtotal	# Items
BIRD_2818146_DUMMY		
Dwelling - Roof		
Roof		
Dwelling - Exterior		
Front Elevation		
Left Elevation		
Rear Elevation		
Right Elevation		
Dwelling - Interior		
Bedroom 1		
Bathroom 1	\$2,339.36	6
Kitchen	\$2,654.91	7
Living Room	\$1,051.85	2
Debris Removal		

#	Cat	Sel	Act	Notes	Description	Coverage	Calc	Quantity	Unit	Unit Price	Sales Tax	RCV	Depreciation	ACV
---	-----	-----	-----	-------	-------------	----------	------	----------	------	------------	-----------	-----	--------------	-----

Language: English (United States) Profile: Carrier Status: In Progress November 29, 2017 Sub Total: \$6,046.12 Inspection Grand Total: \$6,285.47

**COMPLETE**

Printing Final Documents

# Printing Final Documents

Project Claim Info Sketch Estimate Items Complete

Print Exit Help

Work Order... Payment Tracker... Underwriting Checklist...

**Estimate Reports**

Estimate Reports Claim Reports Documents Report Macros Uploaded Documents

Print Options Line Item Detail Images Sketch Info

Report: Final Draft with/without Removal Depreciation

Filter

Not Filtered  
 Filtered

Edit

Paper Type

Plain  
 Letterhead  
 Page 1 Letterhead

Print Selection

Coversheet  
 Line Item Detail  
 Summary  
 Summary of Add-ons  
 Recap by Room  
 Recap by Category  
 Images  
 Sketch

Select All  
De-Select All

Additional Options

Exclude System Notes  
 Exclude Line Numbers  
 Exclude Internal Notes  
 Include a Report Index  
 Display '8' Items as 2 Items

Language English (United States)

View Print Export Close

Click here to change the report type.

- Estimate
- Photo Report
- General Loss Report
- Statement of Loss

Click here to print forms:

- Estimate
- Photo Report
- General Loss Report
- Statement of Loss

**“Final Draft with/without Removal Depreciation”**  
Is the report type many IA firms prefer.

Language: English (United States) Profile: Carrier Status: Completed November 29, 2017 Sub Total: \$6,046.12 Inspection Grand Total: \$6,285.47

# Printing Final Documents

The screenshot shows the 'Estimate Reports' window with the 'Images' tab selected. The 'Report' dropdown is set to 'Final Draft with/without Removal Depreciation'. The 'Number of Images Per Page' is set to 2. The 'Print Image Detail' checkbox is checked. The 'Layout' is set to 'Portrait'. The 'Print' button is highlighted.

Click on the Print Options tab last to finalize printing options.

Click the "images" tab to change the Number of Images Per Page to 2.

Most IA firms & Insurance companies prefer two photos per page in the Photo Report.

**"Final Draft with/without Removal Depreciation"**  
Is the report type many IA firms prefer.

Language: English (United States) Profile: Claims Status: Completed November 23, 2017 Sub Total: \$6,046.12 Inspection Grand Total: \$6,285.47

# Printing Final Documents

Project Claim Info Sketch Estimate Items Complete

Print Exit Help

Work Order... Payment Tracker... Underwriting Checklist...

Estimate Reports

Estimate Reports Claim Reports Documents Report Macros Uploaded Documents

Print Options Line Item Detail Images Sketch Info

Report: Final Draft with/without Removal Depreciation

Filter

Not Filtered  
 Filtered

Edit

Paper Type

Plain  
 Letterhead  
 Page 1 Letterhead

Print Selection

Coversheet  
 Line Item Detail  
 Summary  
 Summary of Add-ons  
 Recap by Room  
 Recap by Category  
 Images  
 Sketch

Select All  
De-Select All

Additional Options

Exclude System Notes  
 Exclude Line Numbers  
 Exclude Internal Notes  
 Include a Report Index  
 Display '&' Items as 2 Items

Language English (United States)

View Print **Export** Close

Change esti...  
Print or E-m...  
Create or O...  
Open the P...  
Record Pay...

Language: English (United States) | Profile: Carrier | Status: Completed | November 29, 2017 | Sub Total: \$6,046.12 | Inspection | Grand Total: \$6,285.47

Uncheck the "Images" box or you will duplicate the photos.

Click "Export" and a drop-down box will appear. Export the file as a PDF.

# Printing Final Documents

The screenshot displays the Xactimate software interface. At the top, a menu bar includes 'Project', 'Claim Info', 'Sketch', 'Estimate Items', and 'Complete'. On the right, there are 'Print', 'Exit', and 'Help' buttons. A 'Claim Reports' window is open, showing a list of report types under the 'Claim Reports' tab. The 'Photo Report' is highlighted. At the bottom of this window, there are buttons for 'View', 'Print', 'Email', 'Export', and 'Close'. The 'Export' button is highlighted with a red box. A red callout box points to the 'Export' button with the text: "Click 'Export' to send a PDF file of Photo Report to XactAnalysis". Another red callout box points to the 'Photo Report' in the list with the text: "Click on 'Claim Reports' tab and scroll down until you see 'Photo Report'". A third red callout box points to the 'Print' icon in the top toolbar with the text: "Click here to save the Photo Report". A fourth red callout box points to the 'Exit' button in the top right with the text: "Click here to Exit and return to the home screen of Xactimate".

Click here to save the **Photo Report**

Click on "**Claim Reports**" tab and scroll down until you see "**Photo Report**"

Click here to **Exit** and return to the home screen of Xactimate

Click "**Export**" to send a PDF file of Photo Report to XactAnalysis

COMPLETE