Page Number _____

XACTIMATE® Scope Sheet

Job Name _____

Location _____

Group Name _____

☐ Duplicate of _____

Is information entered on back of this sheet? ☐ Yes ☐ No

Room Diagram/Job Notes

Missing Wall

	Room Part Name	Shape	Length	Width	Height
(0)					
(1)					
(2)					
(3)					
(4)					

(For more room parts continue to the back of this page.)

Quantity	Length	Height	Opens into E	Type: Opens to

Cat.	Selector	ACT	Calculation	PRICE OPTIONS O N	T N	C H	Description	Deprec	#
									1
									2
									3
									4
									5
									6
									7
									8
									9
									10
									11
									12
									13
									14
									15
									16
									17
									18
									19
									20
									21
									22
									23
									24

Rooms *continued from the front of this page*

	Room Part Name	Shape	Length	Width	Height	Missing Wall				
						Quantity	Length	Height	Opens into **E**	Type: Opens to
(5)										
(6)										
(7)										
(8)										
(9)										

Formulas *Answer the questions for the Dimensioning and Calculation Formulas below.*
Dimensioning Formulas: *See Appendix B of the flipchart.*   **Calculation Formulas:** *See Appendix C of the flipchart.*

FM1 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM2 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM3 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM4 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM5 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM6 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM7 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM8 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM9 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

FM10 Formula Code:_____
Formula Name:_____
Type: ❑ Dimensioning Room # _____
　　　 ❑ Calculation   Line # _____
A ____ B ____ C ____
D ____ E ____ F ____
G ____ H ____ I ____
J ____ K ____ L ____

Price Options

PRICE OPTIONS		
O/N	T/N	C/H

You can set "Price Options" for each price-list item.

The O/N column allows you to set an item as O&P or Non O&P. If you want O&P added to this item, enter an "O" for O&P. If you don't want to add O&P to the line item, write an "N" for Non-O&P.

The T/N column allows you to set an item as Taxable or Non-taxable. If you want taxes added to this item, write a "T" for Taxable. If you do not want Taxes added to the line item, write an "N" for Non-taxable in this column.

In the C/H column, you can specify whether a Contractor or Homeowner will do the work. If a Contractor is doing the work, enter a "C" for Contractor. If a Homeowner will do the work, write an "H" for Homeowner in this column.

Variables *When you enter dimensions for a room, Xactimate automatically calculates "Standard Variables" for you.   The Variables are:*

C	=	square feet of **C**eiling	**LW**	=	square feet of one **L**ong **W**all	**V**	=	Cubic feet of dimensioned object
F	=	square feet of **F**loor	**PC**	=	**P**erimeter of the **C**eiling (LF)	**W**	=	square feet of **W**alls
HH	=	**H**eight in feet	**SH**	=	Height in feet of shortest wall	**WC**	=	square feet of **W**alls *and* **C**eiling
LL	=	**L**ength in feet of long wall	**SW**	=	square feet of one **S**hort **W**all	**WW**	=	in feet of one short wall

Using the Xactimate Scope Sheet

The Scope Sheet is designed for use with the Xactimate flipchart. The inside front cover of the flipchart contains instructions about using the flipchart. Also see the flipchart appendices for information about variables, Dimensioning formulas, and Calculation formulas.

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(0)	Room Name	Shape	Lenght	Width	Height	Missing Wall				
						Quantity	Length	Height	Opens into E	Type: Opens to

Enter the room name. e.g., Kitchen, offset, jog, closet, etc.

Enter the shape of the room. For a standard rectangular shape write in BOX. See Appendix B in the flipchart for other room shapes. When using a room shape other

than BOX, enter the code here and use a formula box on the back of the scope sheet to answer the dimensioning formula questions. Then write that formula box # in the

Length field. If you're entering a circular room, you'll write CIR in the Shape field. If you use formula box # FM1, write FM1 in the Length field instead of a dimension.

---

(0)	Room Name	Shape	Lenght	Width	Height	Missing Wall				
						Quantity	Length	Height	Opens into E	Type: Opens to

If the room part is rectangular, enter the length in this field. To use a Dimensioning formula, enter the formula code in the Shape field, then use a formula box on the back of the scope sheet to

answer the formula questions. See Appendix B of the flipchart for the formula codes and questions. After you've answered the formula questions, write the formula box # in the Length field.

If the room part is rectangular, enter the width and height here.

Enter missing walls only when they open into a room part that has already been scoped.

For example, for a missing wall between a kitchen and an offset, ***don't*** enter the missing wall from the kitchen side. The missing wall ***must*** open into a room part that has already been scoped, so the missing wall is entered from the offset side.

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(0)	Room Name	Shape	Lenght	Width	Height	Missing Wall				
						Quantity	Length	Height	Opens into E	Type: Opens to

The room number.

Enter the number of missing walls of this exact shape. In most cases you'll enter 1.

Enter the length, then height of the missing wall.

These fields ask whether the missing wall runs opens to both ceiling and floor, floor only, ceiling only, or neither floor nor ceiling.

Missing walls open into another room part or to the exterior (E), such as between a kitchen and a pantry, or a picture window that opens to the exterior of the house. If a missing wall opens into another room, write the room part number in this field. (Only enter missing walls when they open into another room part, or to the exterior of the current room or the exterior of the house.)

If the missing wall opens into the exterior, write "E" for Exterior.
(Since room part 0 is the first room part, the missing wall can only open into the exterior.)

Cat.	Selector	Act	Calculation	Price Options O/N	Price Options T/N	Price Options C/H	Description	Deprec

An item code has two parts: ***Category code*** and the ***Selector code***.

Category codes are found on the front page of the flipchart. Selector codes are located under the Category sections.

See the inside cover of the flipchart for more information.

Enter the "Activity" in this column.

+ = replace
- = remove
I = Install Only
M = Material Only

The Activity shows what you'll do with the item. (The second column in the flipchart displays the default Activity.)

You can set "Price Options" for each price list item.

The O / N column allows you to set an item as O&P or Non O&P. If you want O&P added to this item, enter an "O" for O&P. If you don't want to add O&P to the line item, write an "N" for Non-O&P.

The T / N column allows you to set an item as Taxable or Non-taxable. If you want taxes added to this item, write a "T" for Taxable. If you do not want Taxes added to the line item, write an "N" for Non-taxable in this column.

In the C / H column, you can specify whether a Contractor or Homeowner will do the work. If a Contractor is doing the work, enter a "C" for Contractor. If a Homeowner will do the work, write an "H" for Homeowner in this column.

This is an optional field where you can enter a description or field notes.

You don't need to use this field unless you're either changing the item description you see in your flipchart, or entering a description for a new item.

You can enter item depreciation in the Deprec. For example, write a ***depreciation percentage*** as 20%.

Or write the ***life over life span*** as 5/10 for an item that's 5 years old with a 10-year life span.

In the Calculation field you write the quantity for the item. This can be a *number*, *equation*, *variable*, *subvariable*, or *combination of all four*. If you were replacing two light fixtures, you would write "2." In another example, the equation "WC-WC2" means all the walls and ceilings in the room except for the walls and ceilings in subroom number 2.

You can also use Calculation formulas to help you calculate the quantity. Calculation formulas are found in Appendix C of the flipchart. When using a Calculation formula, write the Formula code followed by a colon. For example, to use the Calculation formula that determines the board feet in a joist system , write "JST:" in this field. Next answer the formula questions using a Formula box on the back of the Scope sheet. Last of all, write the Formula box # in the Calculation field.