



XCELERATE'S

FILE STATUS DEFINED

NEW

The job is in the system. The customer may or may not have been contacted / scheduled yet, but there has been no site inspection. The job always starts in this phase.

ESTIMATING (INITIAL)

The site has been inspected, but no work has been started. The customer may require an estimate here, depending on the department. Xcelerate will move to this phase automatically once the site has been inspected.

SALES

An estimate has been provided to the customer, and you are waiting to hear back. Xcelerate will move to this phase automatically once an estimate has been uploaded.

PLANNING

The estimate has been approved and the customer has signed the work authorization / Contract. In EMS situations, you may skip from #1 to #4, because no estimate is required. Xcelerate will move to this phase automatically once a "Work Authorization" has been signed. Also note that jobs push to Quickbooks at this phase.

PRODUCTION

The physical work has actually started; technicians are on-site swinging hammers and setting equipment. you must manually put the job into the production phase, or have a trigger set up in your workflow.

ESTIMATING (FINAL)

The physical work is completed. Xcelerate will move to this phase automatically once a "COC" is uploaded.

INVOICING

An invoice is created (possibly in Quickbooks), based on the estimates that were created. Xcelerate will move to this phase automatically once an "estimate" is uploaded.

RECEIVABLES

The job will remain in this phase while waiting on money to be collected for the services. Xcelerate will move to this phase automatically once an "invoice" is uploaded.

PAID IN FULL

The job can be moved to this phase once all the money has been collected. You must manually put the job into the "Paid in full" phase so you can review each file to ensure everything is collected/completed.

CLOSED

Everything is completed and good to go. Once a job is "Closed" it will fall off of the "Open" jobs list, but can always be accessed later under "All jobs" lists. Some companies move files directly to this phase and skip the "paid in full" phase.

REJECTED

The digital record of notes, photos, documents, dates, etc. will be maintained so you can search for it at a later time if needed, but there was either no or very minimal work completed on this, and there will be nothing collected.

ON HOLD

Use when jobs will not be moving forward in the near future but you will be resuming at a later date

WARRANTY

After the job has been closed you have the option to reopen in a warranty status for any work that is outstanding.



XCELERATE'S

AUTOMATIC STATUS UPDATES

Trigger	EMERGENCY FILE TYPES*	NON EMERGENCY FILE TYPE
New File	NEW	NEW
Arrive onsite date entered or app recognition of personnel onsite. (location required)	SALES	ESTIMATING (JINITAL)
Initial Estimate Uploaded	SALES	SALES
Work Authorization Signed	PLANNING	PLANNING
Start Job Milestone or Form	PRODUCTION	PRODUCTION
COC Milestone Entry or COC Form completed/Uploaded	ESTIMATING (FINAL)	ESTIMATING (FINAL)
Final Estimate Upload or Estimate Milestone entered	INVOICING	INVOICING
Final Invoice Milestone Entered	RECEIVABLES	RECEIVABLES
Updates when 'balance owing' is \$0.00, based on the amount invoiced and amount collected	PAID IN FULL	PAID IN FULL
N/A - Manual Close	CLOSED	CLOSED
N/A - Manual Reject	REJECTED	REJECTED
N/A - Manual Re-open as Warranty	WARRANTY	WARRANTY
N/A - Manual On Hold	ON HOLD	ON HOLD

*Emergency File Types: Water, Structure Cleaning, Bio, Board Up

**If Final Invoiced date is marked