

MILESTONES

Milestones are key dates that should be noted during the progression of the job. KPIs are calculated off of milestones, so in order to ensure accurate KPIs, you'll want to make sure that the dates are entered accurately. Note that with a few exceptions, all of these dates can be manually entered or edited from the "Milestone" section of the job file, or enabled to populate through workflow tasks.



Definitions

MILESTONE	DEFINED
Date of Loss	The date the loss occurred.
Date Received*	The date that the job is entered into Xcelerate. This date is automatically populated.
Date Contacted	The date that the customer was first contacted.
Arrived onsite*	The date of first visit. This will automatically populate when someone who is clocked into the file arrives at the geolocation of the job site.**
Work Authorization*	The date of the work authorization being uploaded from either a form or a document
Estimate Uploaded*	The date of the initial estimate being uploaded from either a form or a document.
Estimate Approved	The date of initial estimate approval.
Assigned to Production or Into Production*	When the job is no longer in the hands of sales or estimating, and the production team is working on their scheduling.
Target Start Date	The date that the work is set to commence.
Start Date	The actual date of work commencement.
Target Completion Date	The date that the work is set to complete
COC (Actual Completion Date)*	The date that the work actually completes. This will populate from a COC/COS being uploaded from a form or document.
Date Invoiced*	The date of the first created invoice. This will populate when an invoice document is uploaded.
Final Invoice Date	The date of the final created invoice.
Date Paid*	The date that the job has been paid. This will populate when the "final invoice date" has been marked, and there is a \$0.00 balance owing on the file. (Invoices - Payments = \$0.00)
Closed Date	The date that someone has reviewed the file and ascertained that all work is completed, all documentation uploaded, and all invoices and payments documented.

*Automated

**Device permissions required