

Create Milestone

1. From **CRM** module, click **Milestones**. Milestones screen will appear.

Milestones

Save Undo Close

+ Insert

▲ Up

▼ Down

✕ Remove

Export ▾

View ▾

Filter (F3)

<input type="checkbox"/> Milestone*	Description*	Priority*
<input type="checkbox"/> Project planning	Project Planning	1
<input type="checkbox"/> Sign Contract	Sign Contract	2
<input type="checkbox"/> Base Setup	Setup CoA, Locations & Ent...	3
<input type="checkbox"/> Technical install	Technical install	4
<input type="checkbox"/> Keystone	Keystone	5
<input type="checkbox"/> Cash Management Setup	Cash Management Setup	6
<input type="checkbox"/> Sales Setup	Sales Setup	7
<input type="checkbox"/> Training	Training	8
<input type="checkbox"/> Data Conversion	Data Conversion	9
<input type="checkbox"/> Purchasing Setup	Purchasing Setup	10
<input type="checkbox"/> Ticket Management Setup	Ticket Management Setup	11
<input type="checkbox"/> Go live assistance	Go Live Assistance	12

?

2.29s

Ready

Refresh

- 2. To add Milestone, go to the next available row or click Insert button.
- 3. Provide ***Milestone, Description** (Milestone should be unique, Priority is auto generated)
- 4. Click Save button to save the milestone.

**user can add multiple milestone as long as the milestone is unique.*

**text - denotes required field to create milestone*