

How to Track Contra Milestones

Objectives


- Add Milestones to contracts
- Track and update milestones workflow

Steps

One important feature available in Contra is the **Milestones** which will help you log the milestones and deliverables of every contract.

There are also two workflows for every milestone: a general one and a financial one.

A Contra user can also visualize the contract milestones in a Gantt chart and can show these milestones to their clients in the Client Portal.

 Milestones will be visible to the Client Portal by default if the contract is visible to the Client Portal.

From the **Milestones** tab, click the "Add Milestone" link at the top right of the page to add a new milestone to the contract/document.

CT158 - Cost-reimbursable QLA

Cancelled Executed Under Approval more Active

Details

Attachments

Approval Center

Signature Center

Milestones

Tasks

Time Entries

Expenses

Emails

Reminders

Matters

Related Contracts/Documents

Settings

Milestones

Show in Client Portal

Add Milestone

Title	Start date	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28
Submit the re...	2023-01-08																												
Obtaining Col...	2023-01-20																												

Milestones

1

Submit the remaining files

Completed

Partially Paid

2

Obtaining Collaborator's Approval

In Progress

Non-billable

Give this milestone a title, define the tasks or deliverables that both parties agree on, as well as the percentage or sum of money that will be paid to the first party once those deliverables are done, set the dates, and attach any related files.

Add Milestone

Title*

Serial Number

Amount

☐
☒ Percentage

USD

Deliverables

Start Date

Due Date

Notify me before

day(s)

by

Reminder Popup

Attach File

Choose File

No file chosen

[Add more](#)

Save

Cancel

You can then track and update the milestone status such as Open, In Progress, Completed, On Hold, or Cancelled.

Milestones

Show in Client Portal

Add Milestone

Title	Start date	January 2023
		1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28
Submit the re...	2023-01-08	
Obtaining Col...	2023-01-20	

Milestones

Submit the remaining files

Amount: 10000

Serial Number: None

Attachments: 0 Document(s)

Deliverables: None

Start Date: 08

Due Date: 31

Completed

Open

In Progress

On Hold

Completed

Cancelled

Partially Paid

As well as the financial status if it's Paid, Partially Paid, Not Paid, Not Applicable, Non-Billable, or Cancelled.

⌵

Partially Paid

Financial Status

💵

Paid

⌵

Partially Paid

🚫

Not Paid

📄

Non-billable

✕

Not Applicable

🚫

Cancelled

⋮

>

⋮

>

For more information on LEXZUR, reach out to us at help@lexzur.com.

Thank you!