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.

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.

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

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

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

Thank you!