

Implementation & onboarding of Fortes Milestones

The implementation of Fortes Milestones is designed to ensure a successful launch of the software within your organisation. The setup is tailored to your processes and working methods, enabling employees to start working with Milestones quickly.

For onboarding, you select an implementation package. This determines the level of guidance, the depth of the setup and the additional support provided during implementation.

What will be configured

During implementation, Fortes Milestones is configured based on your working methods and choices.

The following elements are generally included:

- Setting up projects, activities and structures
- Recording rates and pricing agreements
- Configuring time tracking and approval processes
- Setting up invoicing and draft invoices
- Connecting the financial administration and other systems
- Providing reports and insights

This setup forms the basis for the daily use of the software and determines how employees work with the system.

The approach and level of guidance differ per organisation. This depends on the preferred implementation speed, the required level of support and the complexity of the setup. You therefore select an implementation package that matches your needs.

Implementation packages

You start with an implementation package that suits the size and complexity of your organisation.

The packages differ in terms of:

- Level of guidance and support
- Depth of setup and advice
- Amount of training and coordination
- Options for planning, reporting and integrations

Below is an overview of the available packages and what is included in each.

Implementation packages	Core	Plus	Managed
Scope & conditions			
Sector	Accountancy	Accountancy	Accountancy / IT *
Maximum number of users	50	100	200 *
Maximum number of companies	1	3	5 *
All integrations	–	–	✓
On-site consultancy	–	✓	✓
Advanced rate configuration **	–	–	✓
Invoice layout variations	1/5	2/5	5/5
Level of support	1/5	2/5	5/5
Contents			
Self-service training	✓	✓	✓
CRM & financial software integration	✓	✓	✓
Standard Power BI dashboard setup ***	✓	✓	✓
Explanation and advice: projects	✓	✓	✓
Explanation and advice: invoicing	✓	✓	✓
Invoicing support	✓	✓	✓
Invoicing training	–	✓	✓
Basic training for key users	–	✓	✓
Explanation and advice: planning	–	–	✓
Explanation and advice: additional insights	–	–	✓
Explanation and advice: Power BI	–	–	✓
Response time during implementation	2 working days	1 working day	1 working day
Investment			
Investment (one-off, excl. VAT)	TBD	TBD	TBD

Notes

Self-service implementation training covers: implementation process, use of tiles, time tracking, approving hours, budgets, instalments/advances, invoicing, leave registration, project board, planning, importing WIP and Power BI.

Not included / available on request (additional work): travel expenses, CRM import, custom invoice layout, additional reports and extra Power BI reports.

Footnotes

* For a different sector or a higher number of users/companies, we will provide a customised quotation.

** Applies to configurations other than a rate per employee or per item.

*** The standard Power BI dashboard is set up with an Insight or Optimize subscription.

How to choose the right implementation package

The choice of implementation package depends on how you want to get started and how much support you require during configuration. The following considerations often play a role:

- How much time and capacity you can make available internally
- To what extent your processes have already been clearly defined
- Whether you want guidance with configuration and decision-making
- The need for training and adoption within the organisation
- The role of planning, reporting and integrations at launch

The packages provide different levels of support:

- **Core**
Designed for a structured start, with the essentials configured while your team handles a large part of the setup independently.
- **Plus**
Provides additional guidance on configuration and use, with greater attention to users, processes and adoption within the organisation.
- **Managed**
Designed for a fully guided implementation, with intensive support for configuration, optimisation and effective use of the platform.

Based on these considerations, you select an implementation package that matches your organisation and preferred way of working.

Commitment from your organisation

The success of the implementation and the use of Fortes Milestones depend greatly on the commitment within your organisation. It is therefore important to actively involve several roles: someone who can make decisions about configuration and working methods, one or more key users who will work with the software, representatives from invoicing or finance and, preferably, someone with an affinity for IT or systems.

These people are involved in configuring and testing the environment and ensure that the software aligns with the organisation's working methods.

In practice, their activities include:

- configuring and checking master data
- testing processes such as time tracking, approval and invoicing
- documenting working methods and agreements
- sharing knowledge within the organisation

These activities take place alongside day-to-day work and require time and attention during the implementation period. The level of guidance and support depends on the selected implementation package.