Implementation & setup

Fortes Milestones

The implementation of Fortes Milestones is aimed at getting the software off to a good start within your organisation. The setup is tailored to your processes and way of working, so that employees can start working with Milestones quickly.

To get started, you work with an implementation package. This determines the level of guidance, the depth of the setup and the additional support during the implementation.

What is set up

During the implementation, Fortes Milestones is set up based on your way of working and your choices. A number of elements almost always come up:

- Setting up projects, activities and structures
- Recording rates and pricing agreements
- Setting up time registration and approval processes
- Setting up invoicing and invoice proposals
- Connecting to the financial administration and other systems
- Making reports and insights available

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

> **How this is approached and supported differs per organisation.** It depends on the desired speed of implementation, the level of guidance and the complexity of the setup. That is why you work with an implementation package that matches your situation.

Implementation packages

You start with an implementation package that suits the size and complexity of your organisation. The packages differ in:

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

On the next page, you will find an overview of the available packages and what each one includes.

Packages at a glance

Implementation packages	Core	Plus	Managed
Scope & conditions			
Sector	Accountancy	Accountancy	Accountancy / IT *
Max. number of users	50	100	200 *
Max. number of companies	1	3	5 *
All integrations	–	–	✓
On-site advice	–	✓	✓
Extended rate setup **	–	–	✓
Invoice layout variations	1/5	2/5	5/5
Level of support	1/5	2/5	5/5
Contents			
Self-service training	✓	✓	✓
CRM & financial package integration	✓	✓	✓
Power BI standard 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)	**€ 2,600**	**€ 4,450**	**€ 7,500**

Notes

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

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

Footnotes

* For other industries or a higher number of users/companies, we will prepare a customised quote.

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

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

Picking the right package

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

- How much time and capacity you can free up internally
- To what extent processes have already been clearly defined
- The wish for guidance with setup and decision-making
- The need for training and adoption within the organisation
- The role of planning, reporting and integrations at the start

The packages offer different levels of support:

Core

Aimed at a structured start, where the basics are set up and you take on a large part of the setup yourselves.

Plus

Offers extra guidance with setup and use, with more attention to users, processes and adoption within the organisation.

Managed

Aimed at a fully guided implementation, where setup, optimisation and use of the platform are intensively supported.

Based on these considerations, an implementation package is chosen that suits your organisation and your preferred way of working.

Involvement from your organisation

The success of the implementation and the use of Fortes Milestones depends to a large extent on the involvement of your organisation. That is why it is important that a number of roles are actively involved:

- Someone who can make decisions about the setup and way of working
- One or more key users who will work with the software
- Involvement from invoicing or finance
- Preferably someone with an affinity for IT or systems

These people are involved in setting up and testing the environment and make sure the software fits your way of working. In practice, this includes:

- Setting up and checking master data
- Testing processes such as time registration, approval and invoicing
- Recording working methods and agreements
- Transferring knowledge within the organisation

> This work takes place alongside day-to-day activities and requires time and attention during the implementation. **The level of guidance and support depends on the chosen implementation package.**