ORGANIZE YOUR PRODUCTION

Milestones within a Digi-Pitch

Group Work Cards by stage and see what belongs where.

01 What is a milestone?

A **milestone** is a named stage of work within a Digi-Pitch. It groups related Work Cards so you can see which tasks belong to planning, delivery, revisions, or approval. Each milestone has an ID (such as **M1**) and a title; a Work Card can be placed in one milestone or left unassigned.

02 Find the milestone board

Open Digi-Pitch > **Work Board** > **Digi-Pitch Milestones**

Scroll horizontally to see custom stages and the unassigned column.

03 Start with five default milestones

These are the starting stages. A column can be empty until Work Cards are assigned.

M1	M2	M3	M4	M5
Planning	**Gather Requirements**	**Initial Asset Delivery**	**Revisions**	**Final Approval**
Early planning	Needs & specs	First deliverables	Refinements	Final review

Milestone Unassigned Work Cards without a selected milestone appear here.

04 Add a Custom Milestone

1. **Choose Add Milestone**
   Use the button above the columns; Add is not in the 3-dot menu.
2. **Set ID & Title**
   The ID starts with M; use a unique number and clear name.
3. **Select Work Cards**
   Optionally check cards to add to this stage now.
4. **Save Milestone**
   The new column appears on the board.

05 Edit a Custom Milestone

3-dot menu

On the custom milestone's column, open the **3-dot menu > Edit Milestone**. Update the ID or Title, check or uncheck Work Cards under **Select Work Cards**, then choose **Save Milestone**. IDs must be unique.

Assign & move Work Cards

Use the milestone board, the milestone dialog, or the Work Card itself to choose a stage.

A Drag it on the milestone board

Drag a Work Card from its current column—or **Milestone Unassigned**—to a different milestone. To clear the assignment, drop it in **Milestone Unassigned**.



B Select cards in the milestone dialog

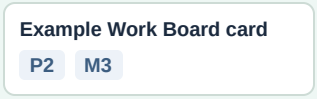
Choose **Add Milestone** or open a column's **3-dot menu > Edit Milestone**. Under **Select Work Cards**, check the cards to include, then choose **Save Milestone**. When editing, uncheck a card to remove it from that milestone.

C Add or edit a milestone on a Work Card

1. Open the Work Card and select its **Overview** tab.
2. Find the **Milestone** field in the card's top information area and open its dropdown.
3. To add an assignment, choose an available default milestone (M1–M5) or a listed custom milestone. The selection updates the card.
4. To change it later, reopen the dropdown and choose a different milestone. Choose **None** to remove the assignment.



Note: If you only see a milestone label instead of a dropdown, you do not have editing access in that view (or the card is archived).



Check the Work Board: Its cards show the selected milestone's **ID badge** (for example, M3) beside the priority badge. The board shows the code, while the milestone board shows the named stage.

Before deleting a milestone

Deleting a milestone moves its Work Cards to the unassigned column. This is currently a prototype: milestone changes may not survive a page reload, and custom stages may not appear consistently in the Work Card dropdown.