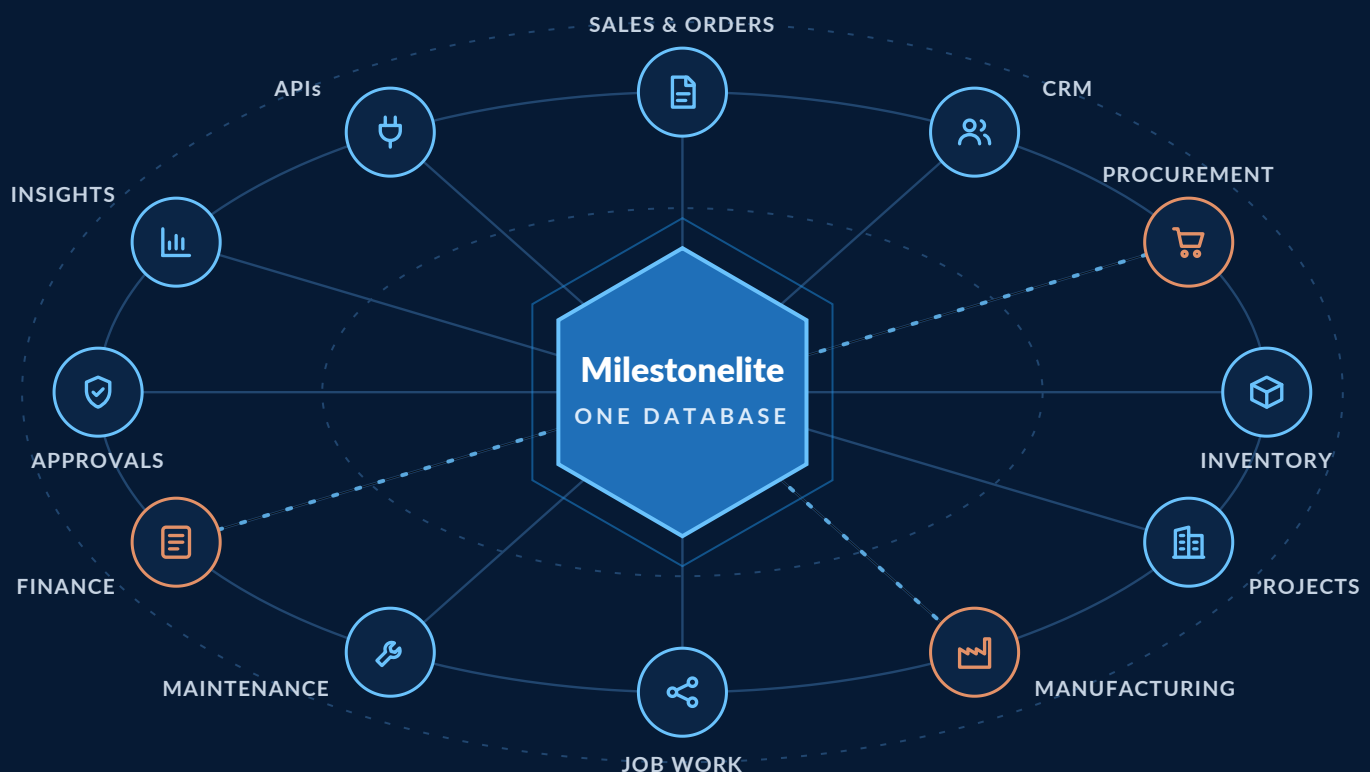


MILESTONELITE ERP · CRM · INSIGHTS

One Connected System. Every Process. Every Decision.

ERP, CRM and management insights for project-driven businesses, manufacturers, distributors and multi-company groups.



THE BIG PICTURE

- 02 The connected ecosystem
- 03 Before and after ERP
- 04 Order to purchase to cash
- 17 Milestone mobile
- 18 Value for every leader
- 19 How we implement

MODULES

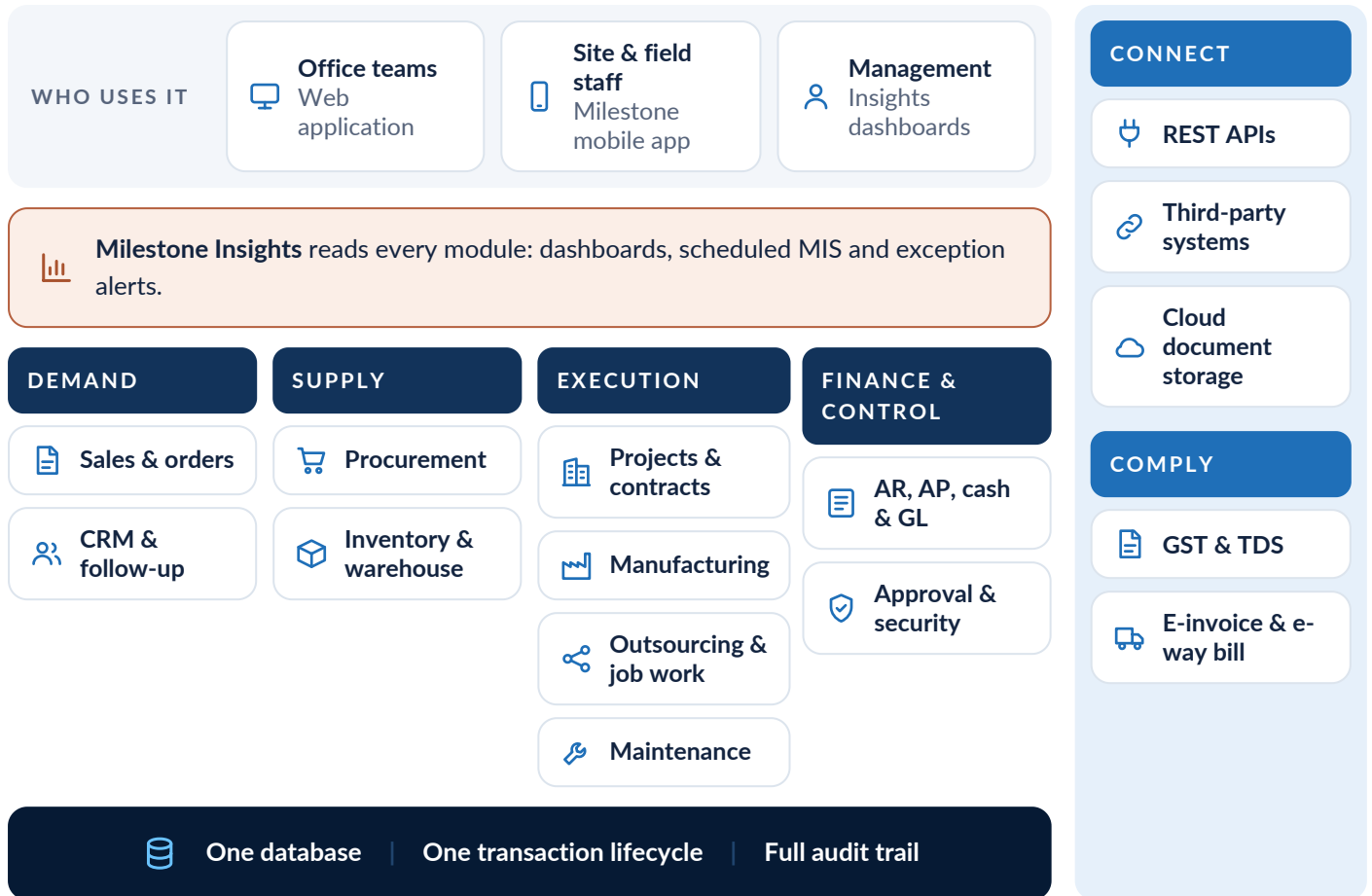
- 05 Sales & order management
- 06 CRM & follow-up
- 07 Procurement
- 08 Inventory & warehouse
- 09 Projects & contracts
- 10 Manufacturing
- 11 Outsourcing & job work
- 12 Maintenance
- 13 Finance & compliance
- 14 Approval & security
- 15 Milestone Insights
- 16 APIs & integrations

THE CONNECTED ECOSYSTEM

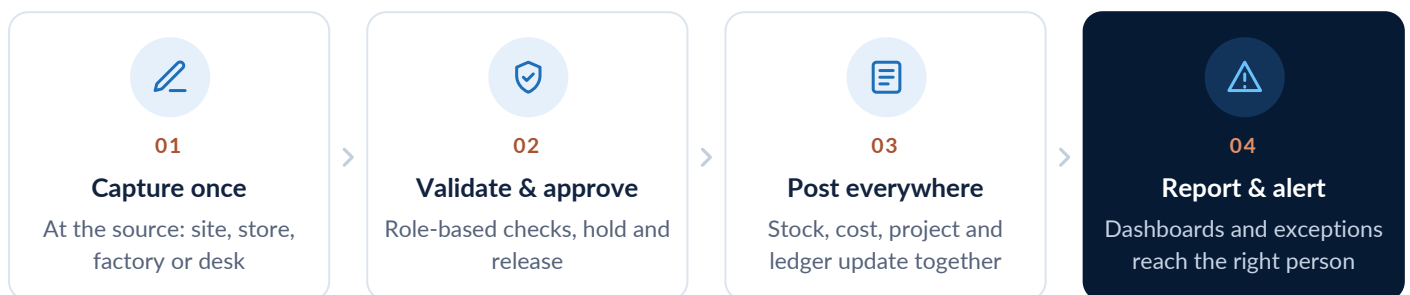
Every Department Works From One Record

Milestonelite connects demand, supply, execution and finance in one database. Each transaction updates every team that depends on it.

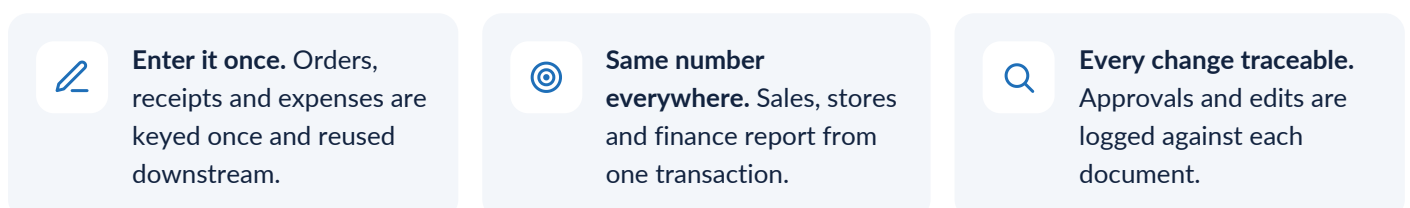
ERP ECOSYSTEM



HOW INFORMATION FLOWS



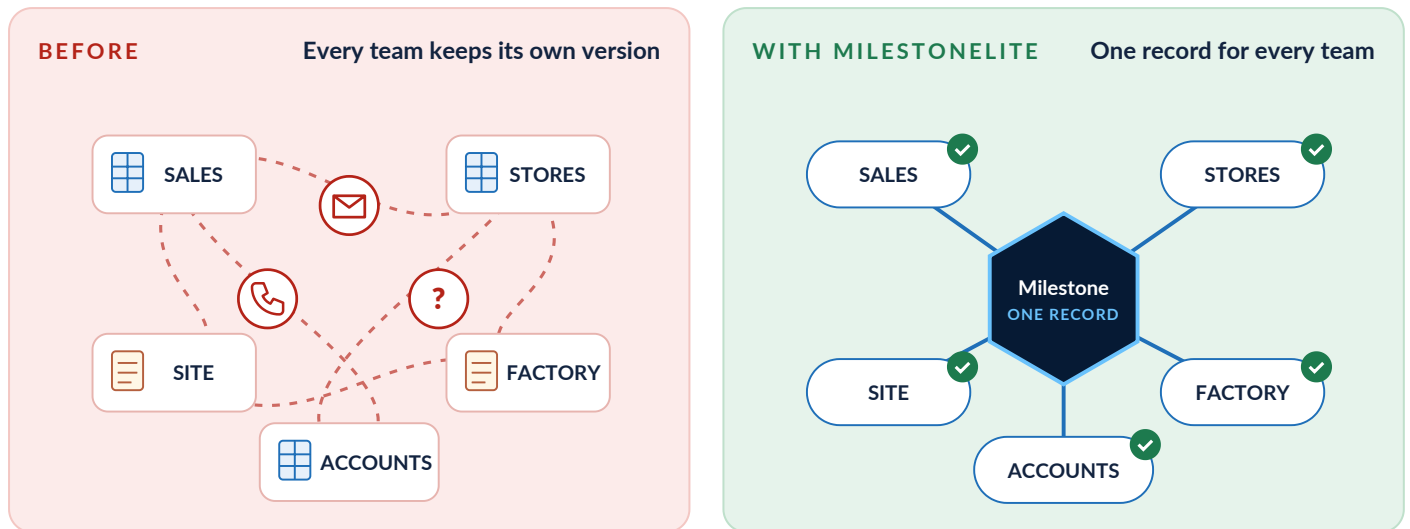
WHAT CHANGES FOR THE BUSINESS



BEFORE AND AFTER

From Disconnected Spreadsheets to Connected Control

Most growing businesses run on registers, spreadsheets and phone calls between departments. Milestonelite replaces the hand-offs with one flow of transactions.



WHAT CHANGES, AREA BY AREA

AREA	BEFORE	WITH MILESTONELITE
Delivery promises	Given from experience, checked later	Committed from stock, schedule and material
Purchasing	Urgent buys and follow-up by phone	Requirements consolidated, POs tracked to receipt
Site & shop-floor material	Reconciled at month-end, if at all	Issued, used and returned against each job
Job work	Vendor balances kept in notebooks	Material out, back and pending by vendor
Billing	Work is done but the invoice waits	Billable work visible, invoices raised on time
Month-end	Days spent reconciling departments	Ledger updates as transactions happen
Management view	Reports assembled by hand	Dashboards and exception alerts



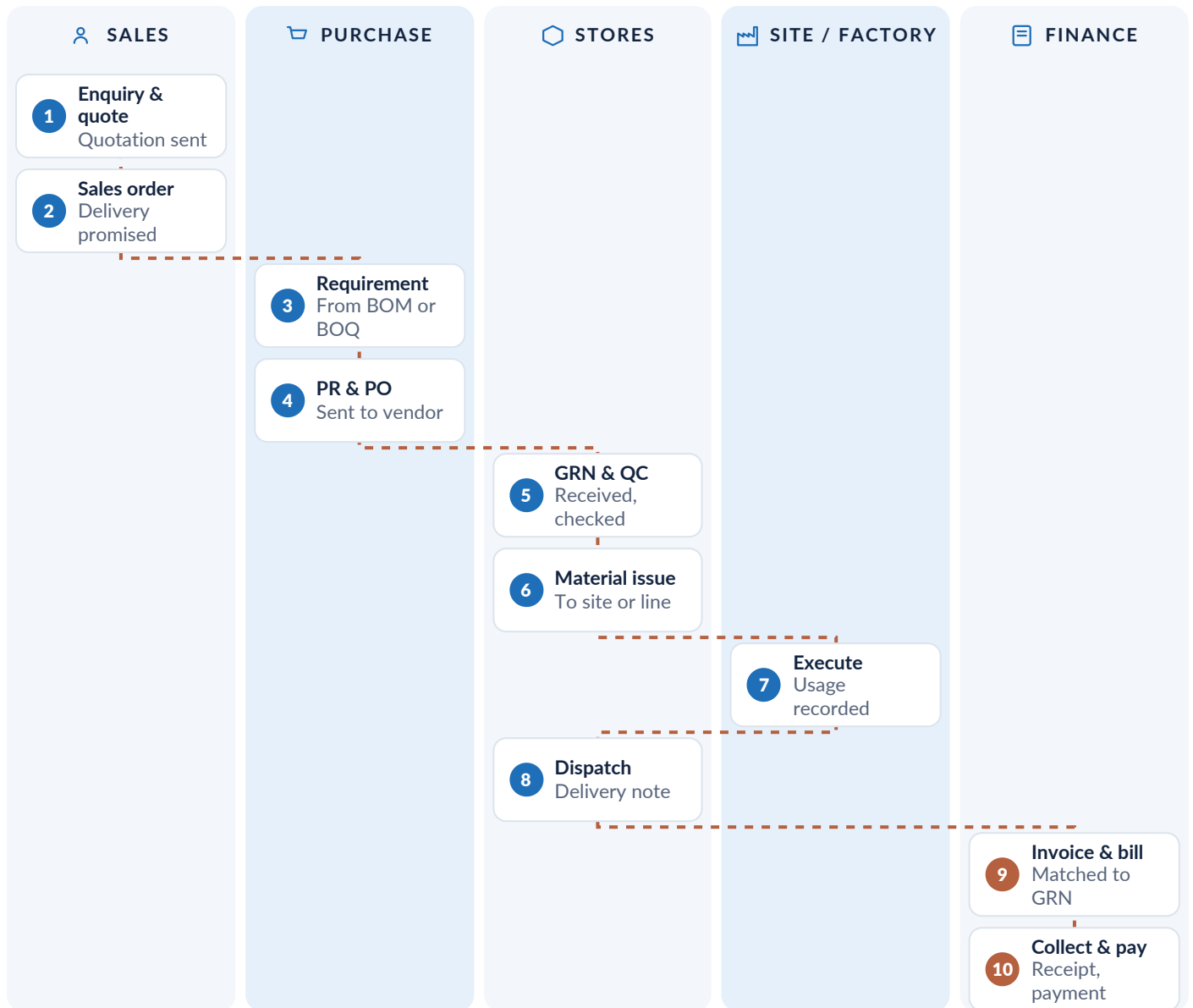
The result: decisions made on today's numbers, not last month's.

END-TO-END PROCESS

From Sales Order to Purchase to Cash

One customer order drives requirement, purchase, receipt, execution, billing and collection. Each step creates the document the next step needs.

CROSS-DEPARTMENT WORKFLOW



Management view. Every step above feeds Milestone Insights: order book, ageing, stock, WIP and margin.

THREE FLOWS IN ONE SYSTEM

ORDER-TO-CASH

1 → 2 → 8 → 9 → 10

From quotation to money in the bank

SALES-TO-PURCHASE

2 → 3 → 4

Buy against real demand, not guesswork

PROCURE-TO-PAY

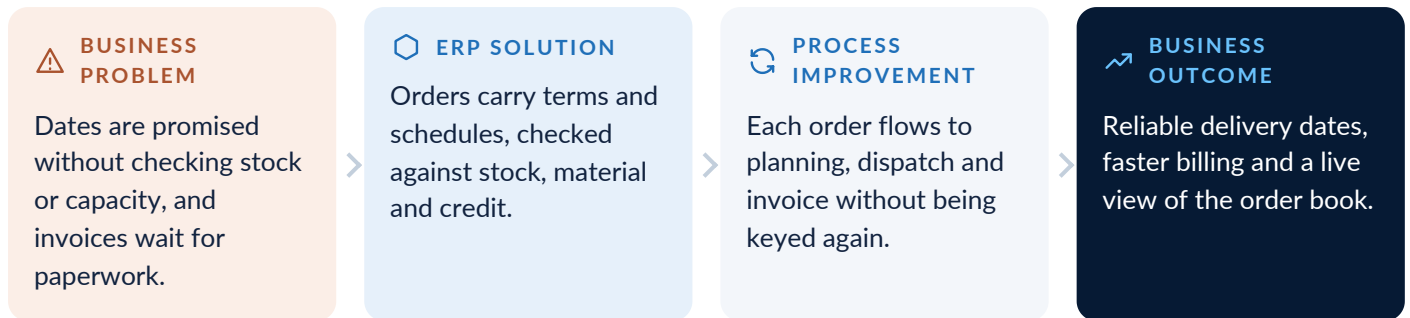
4 → 5 → 9 → 10

Pay only for what was received and accepted

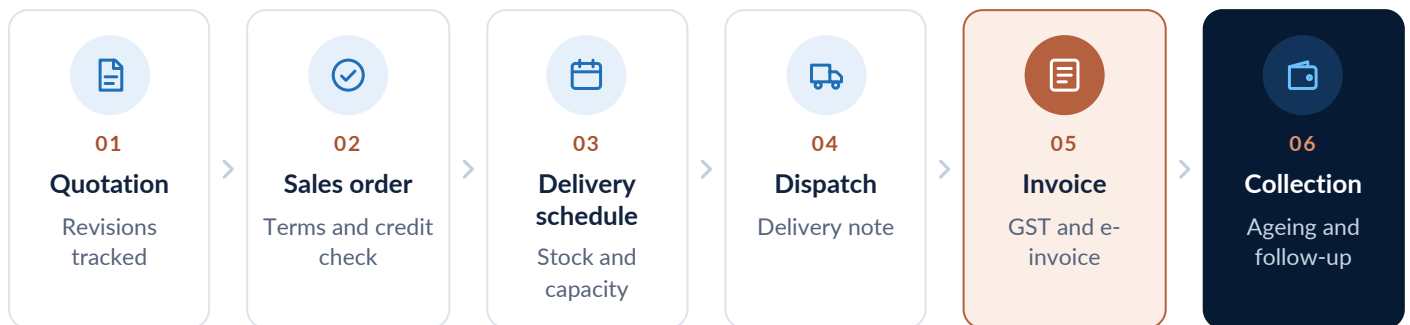
ORDER-TO-CASH

From Quotation to Cash, Without Re-Keying

Quotations, orders, delivery schedules, dispatch and invoicing in one flow, with stock and credit checked before you commit.

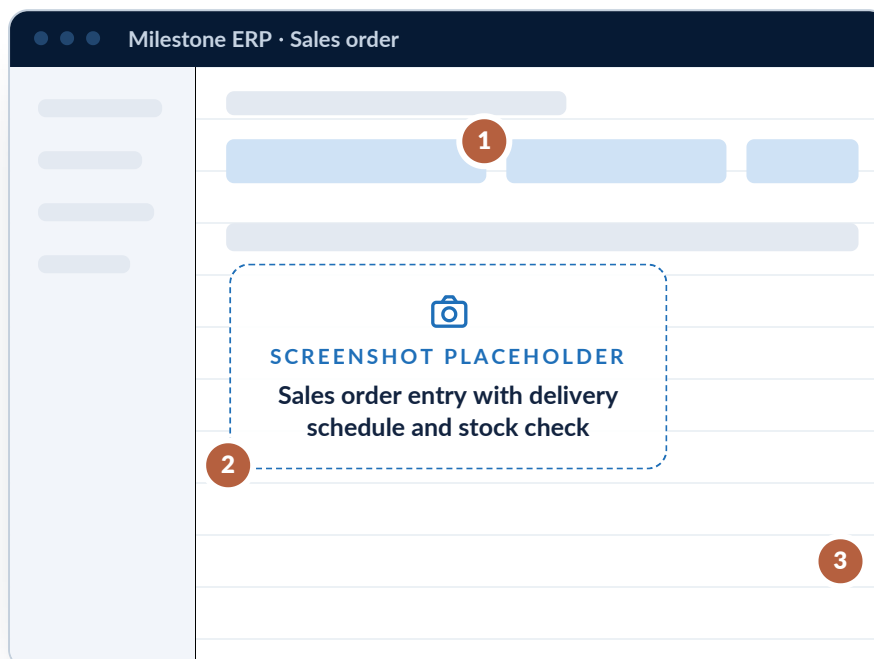


PROCESS FLOW · ORDER-TO-CASH



WORKS WITH CRM Inventory Manufacturing Finance Insights

IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Customer terms and credit status on the order
- 2 Item-wise delivery schedule
- 3 Stock and pending orders before you commit

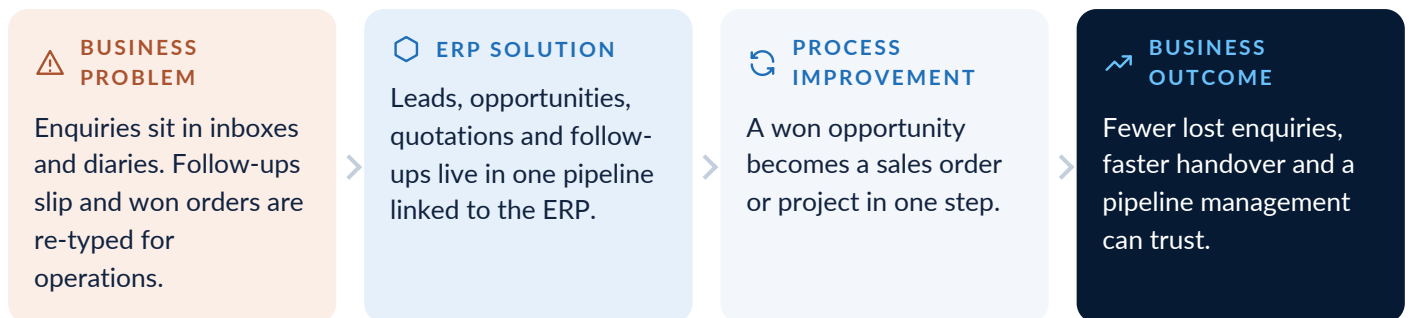
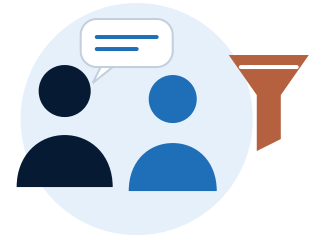
MEASURES TO WATCH

- ▲ On-time delivery
- ▼ Days from dispatch to invoice
- ▼ Unbilled dispatches

CUSTOMER JOURNEY

Never Lose an Enquiry Between Follow-Ups

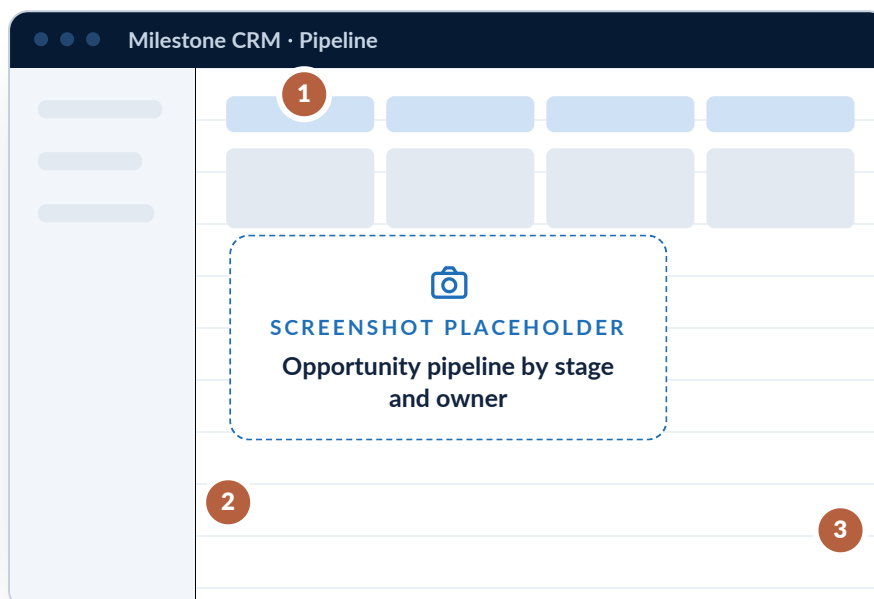
Track every lead from first call to won order, then hand it to execution with the quotation and terms attached.



CUSTOMER JOURNEY MAP



IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Opportunities grouped by stage
- 2 Next follow-up date and owner
- 3 Convert a won deal to an order

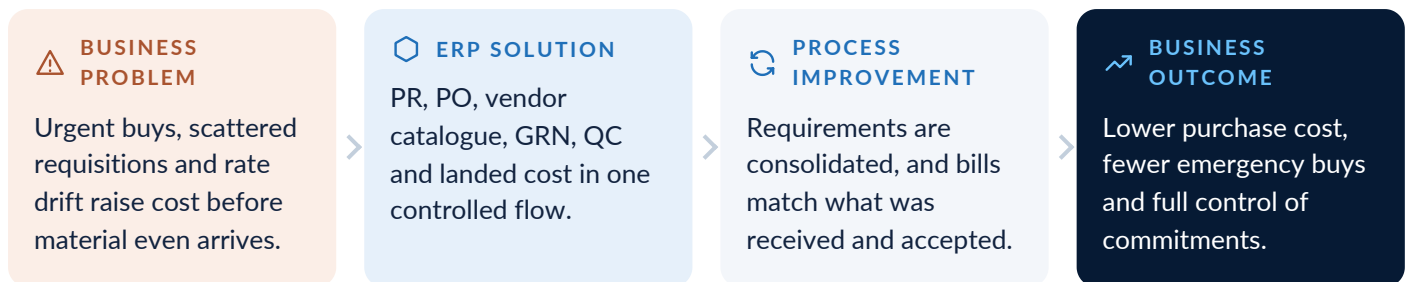
MEASURES TO WATCH

- ▲ Enquiry-to-order conversion
- ▼ Overdue follow-ups
- ▼ Days from quote to decision

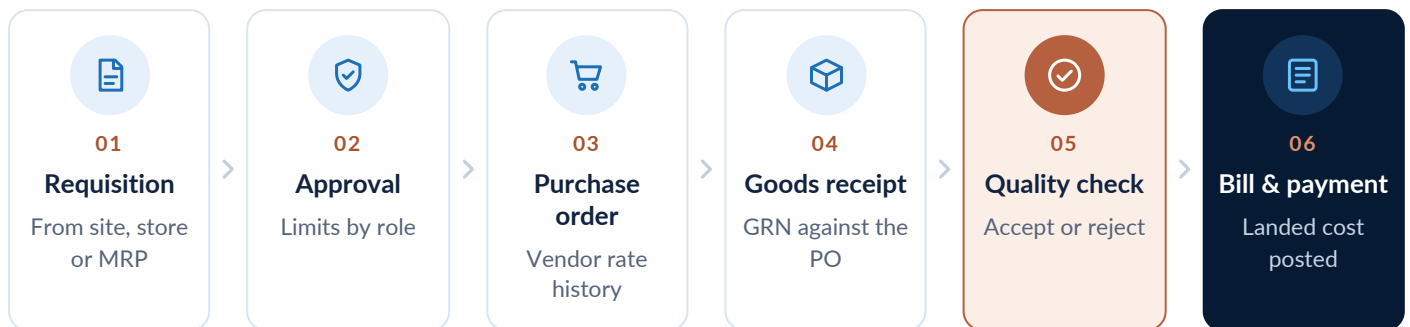
PROCURE-TO-PAY

Buy Against Real Demand. Pay for What Arrived.

Requisitions from sites and departments become approved purchase orders, checked receipts and matched bills.

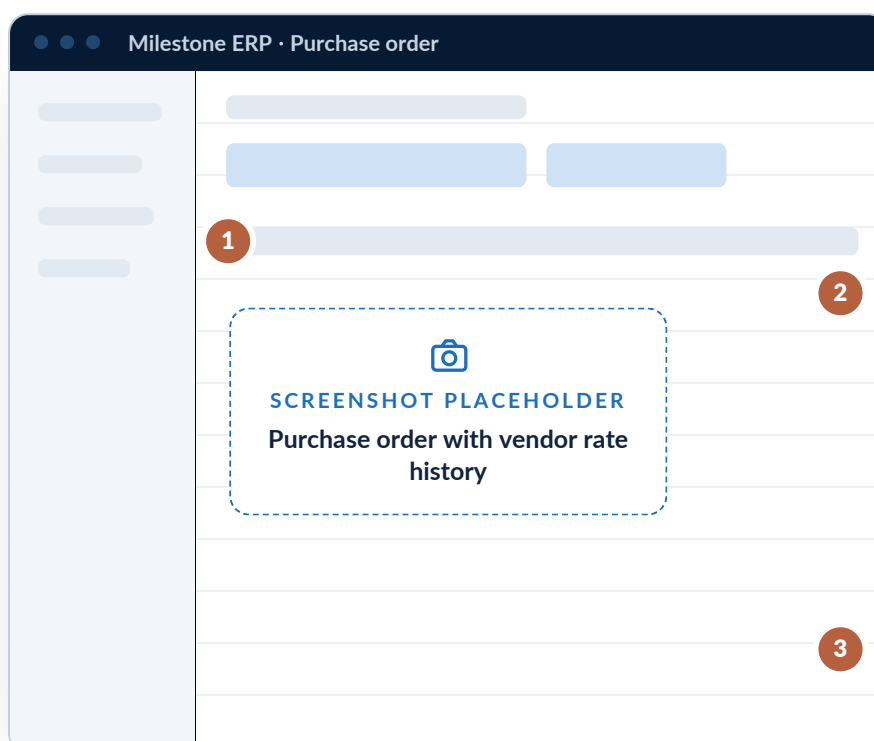


PROCESS FLOW · PROCURE-TO-PAY



THREE-WAY MATCH Purchase order = Goods receipt = Vendor bill → Payment released

IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Lines pulled from approved requisitions
- 2 Last purchase rates by vendor
- 3 Pending receipt against each line

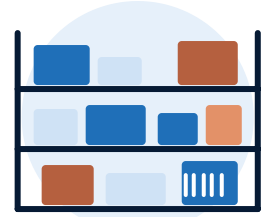
MEASURES TO WATCH

- ▼ Emergency purchases
- ▼ Rate variance on key items
- ▲ On-time supplier delivery

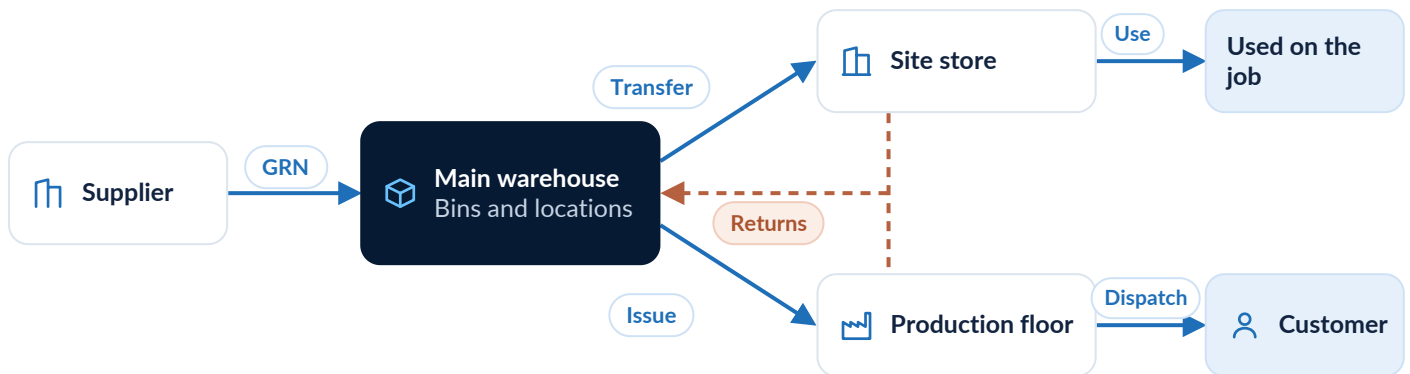
INVENTORY MOVEMENT

Know What You Have, Where, and Why

Every receipt, transfer, issue and return updates stock by warehouse, site and location as it happens.

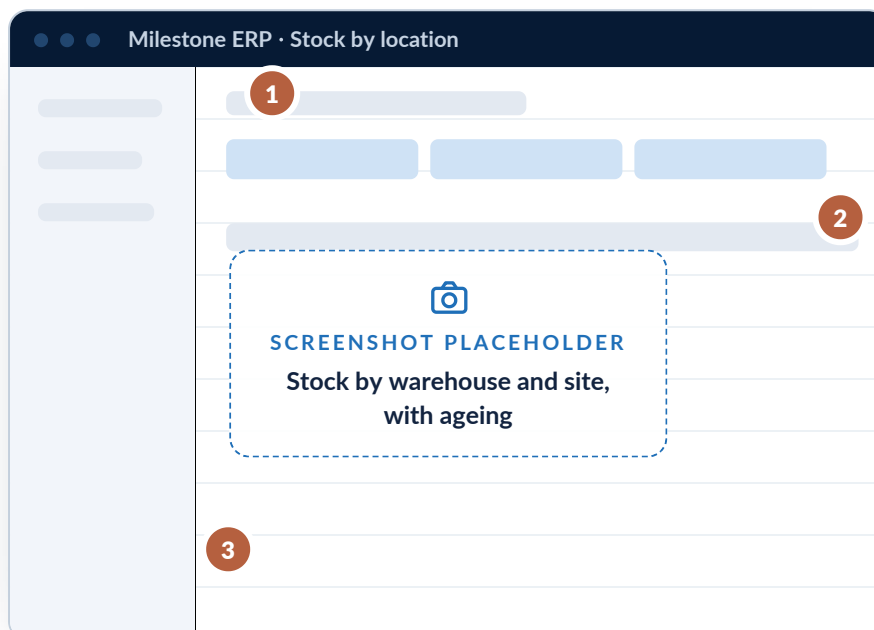


INVENTORY MOVEMENT MAP



WORKS WITH Procurement Projects Manufacturing Sales Finance

IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Stock by warehouse, site and location
- 2 In-transit and under-inspection quantity
- 3 Ageing and slow-moving items

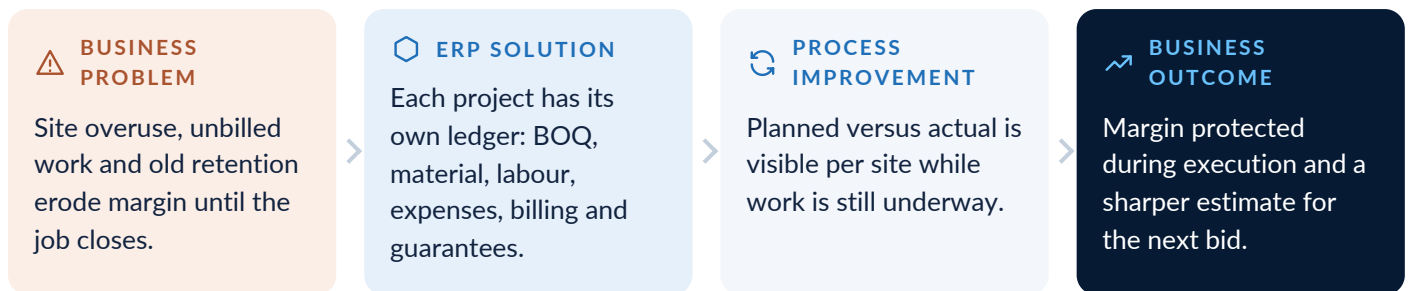
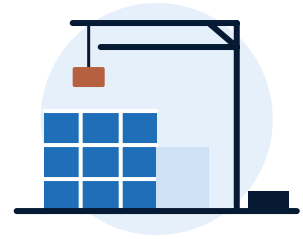
MEASURES TO WATCH

- ▼ Slow-moving stock value
- ▲ Stock accuracy
- ▼ Open returnables

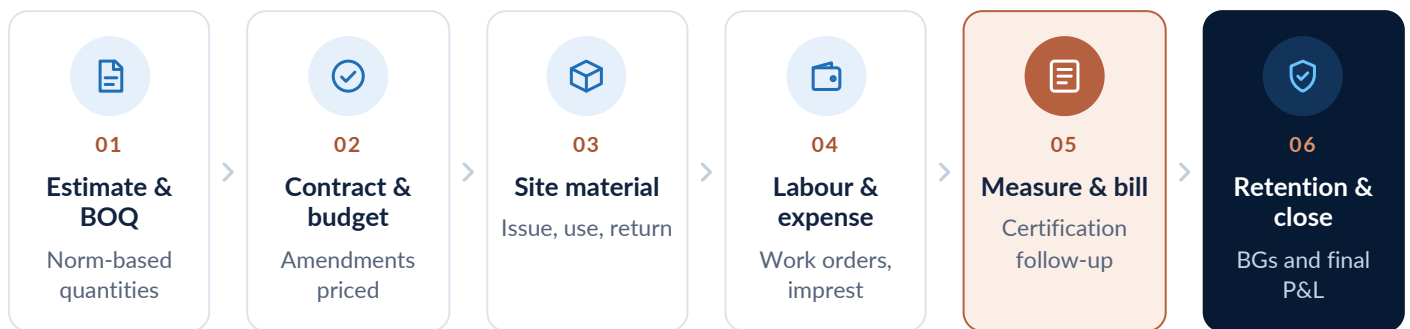
PROJECT LIFECYCLE

Protect Margin From Estimate to Final Handover

BOQ, budgets, site material, labour, billing, retention and guarantees on one project ledger.

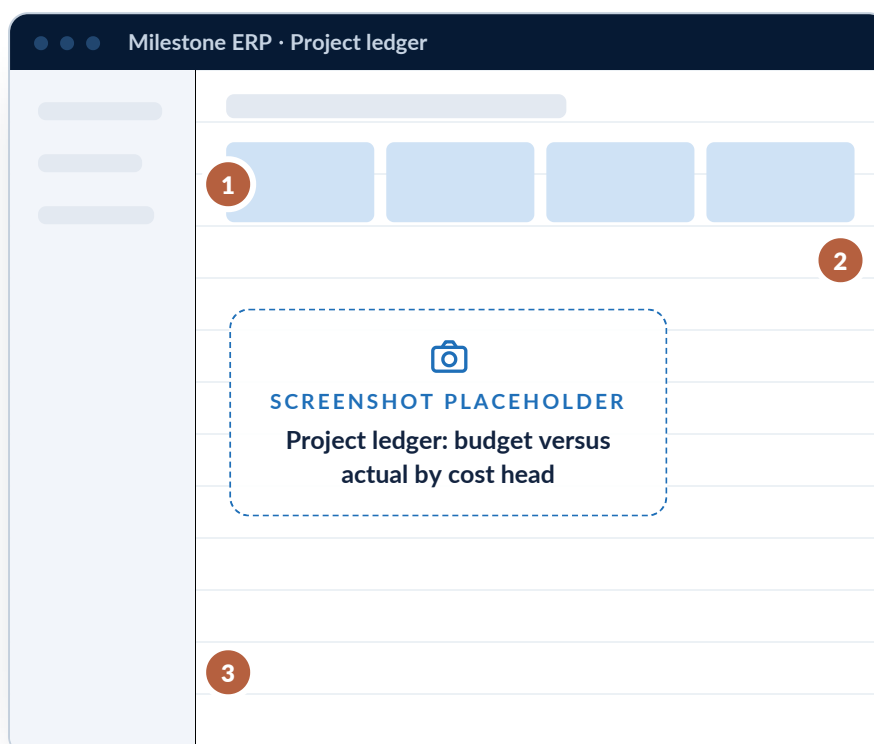


PROCESS FLOW · PROJECT LIFECYCLE



BUILT FOR Interior fit-outs Raised flooring Ceilings & acoustics Building materials EPC

IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Budget versus actual by cost head
- 2 Billed, certified and pending amounts
- 3 Retention and bank guarantees due

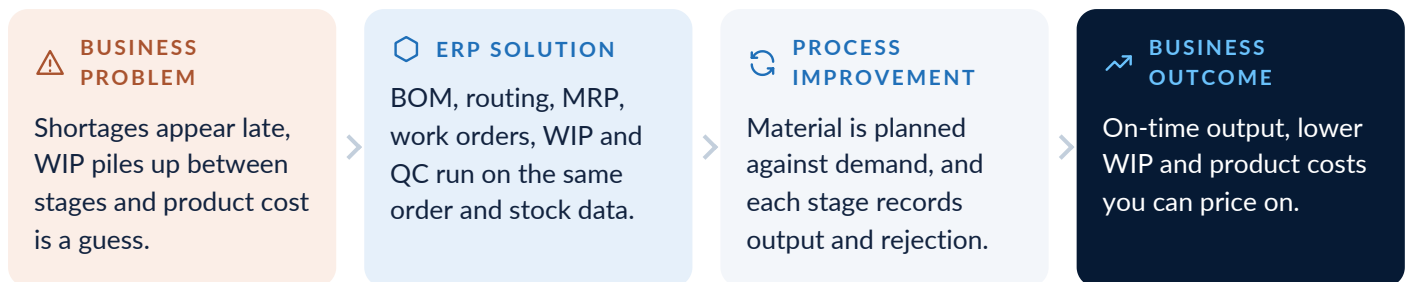
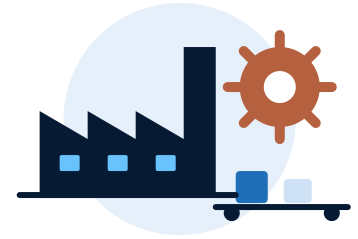
MEASURES TO WATCH

- ▼ Material variance by site
- ▼ Days from work done to invoice
- ▼ Retention outstanding

MANUFACTURING LIFECYCLE

Plan, Make and Cost Every Order

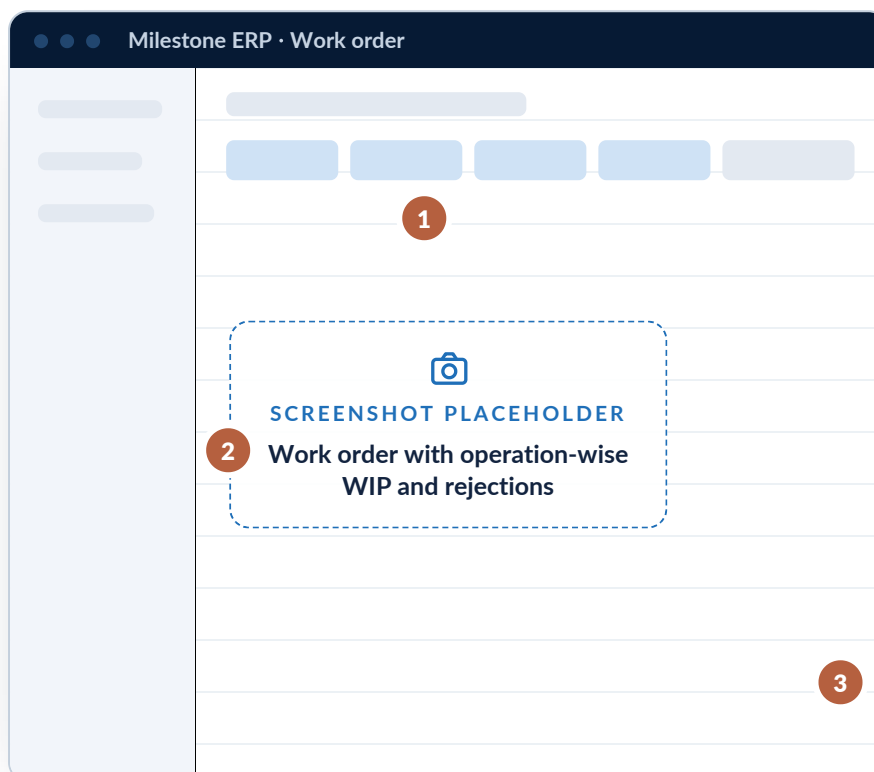
Multi-level BOMs, routing, MRP, work orders, WIP, quality and product costing, all connected to the customer order.



PROCESS FLOW · MANUFACTURING LIFECYCLE



IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- Operations and status by stage
- Material issued versus consumed
- Rejection and rework recorded

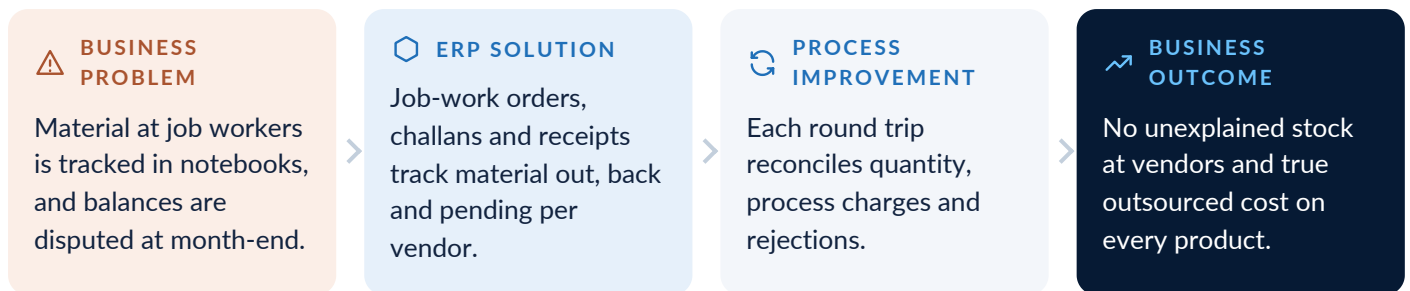
MEASURES TO WATCH

- Schedule adherence
- Ageing work in progress
- Rejection rate

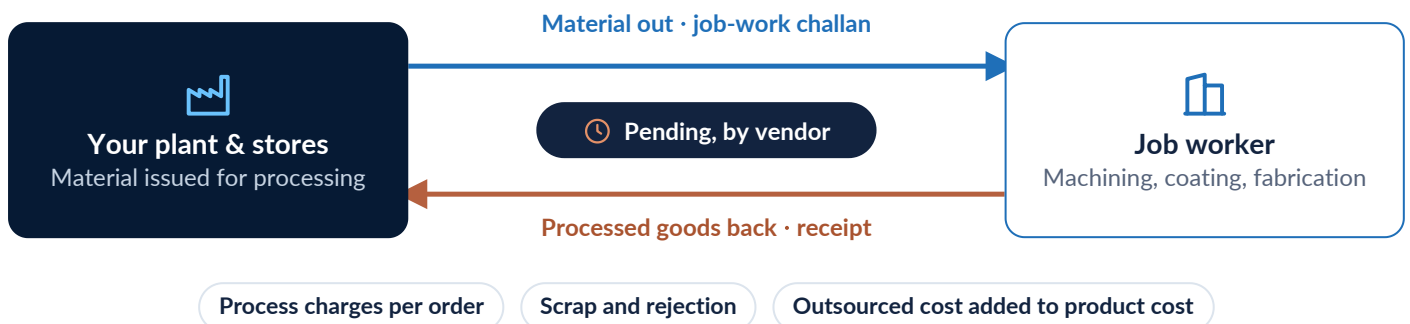
EXTENDED FACTORY

Track Every Unit at Your Job Workers

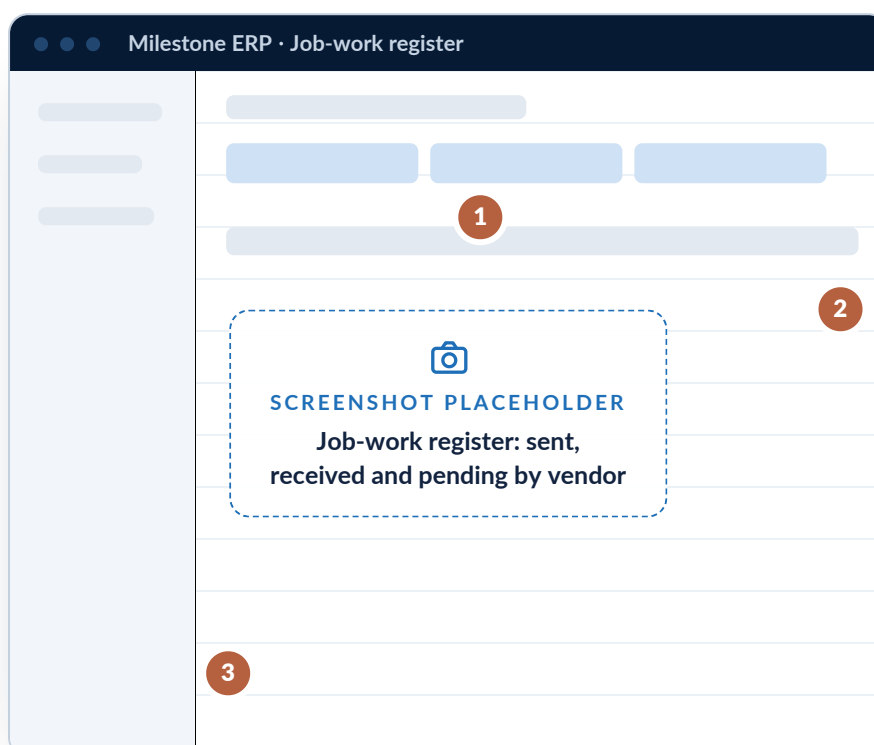
Material sent, processed, returned and pending, vendor by vendor, with outsourced cost added to product cost.



MATERIAL ROUND TRIP



IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Material sent, received and pending
- 2 Ageing of material at each vendor
- 3 Process charges against each order

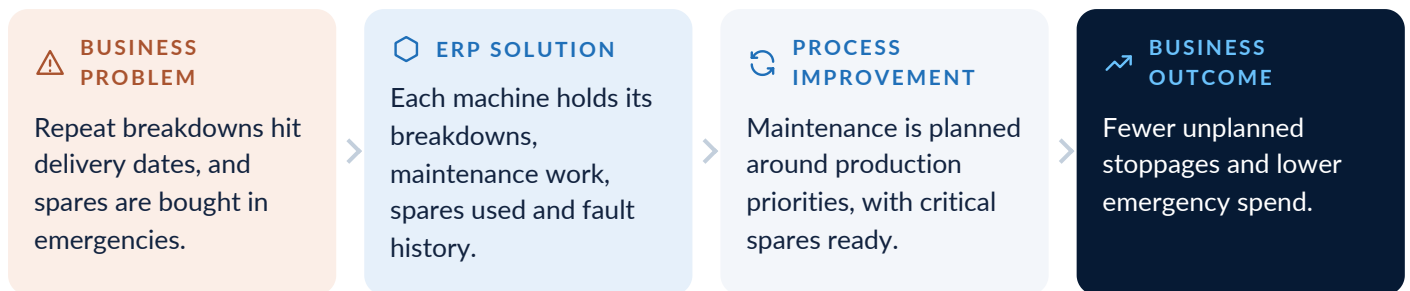
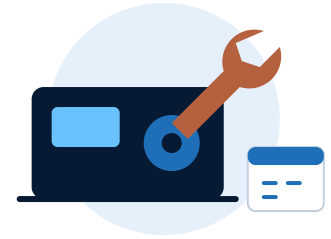
MEASURES TO WATCH

- ▼ Material pending at vendors
- ▼ Days at job worker
- ▼ Vendor rejections

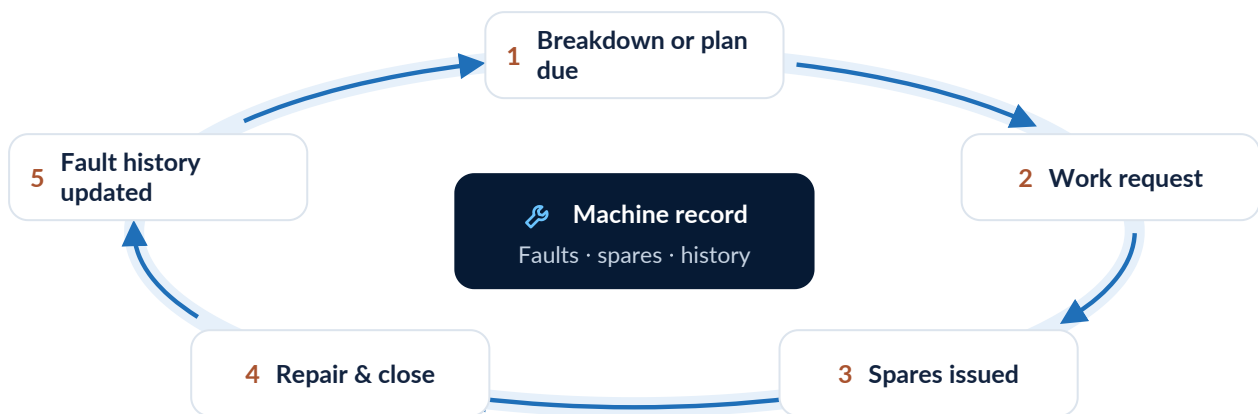
MAINTENANCE CYCLE

Keep Machines Running and Spares Under Control

Breakdowns, maintenance work, spares and fault history linked to each machine and to production priorities.

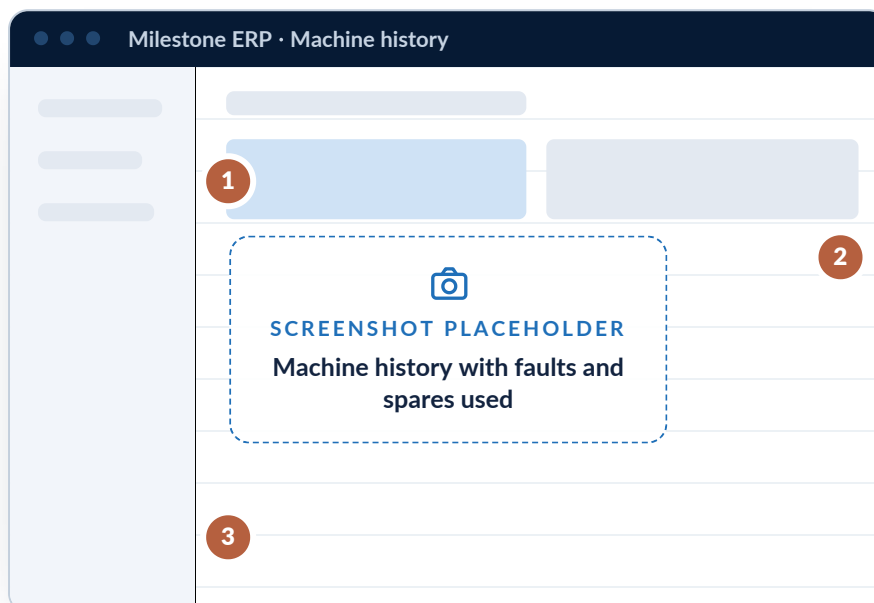


MAINTENANCE CYCLE



WORKS WITH Manufacturing Inventory Procurement Insights

IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Fault history by machine
- 2 Spares consumed per machine
- 3 Open maintenance work

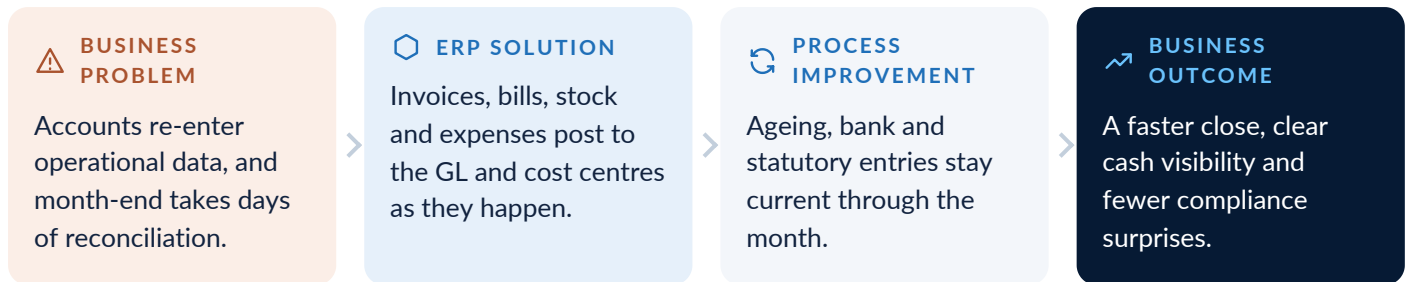
MEASURES TO WATCH

- ▼ Unplanned stoppages
- ▼ Emergency spares purchases
- ▲ Machine availability

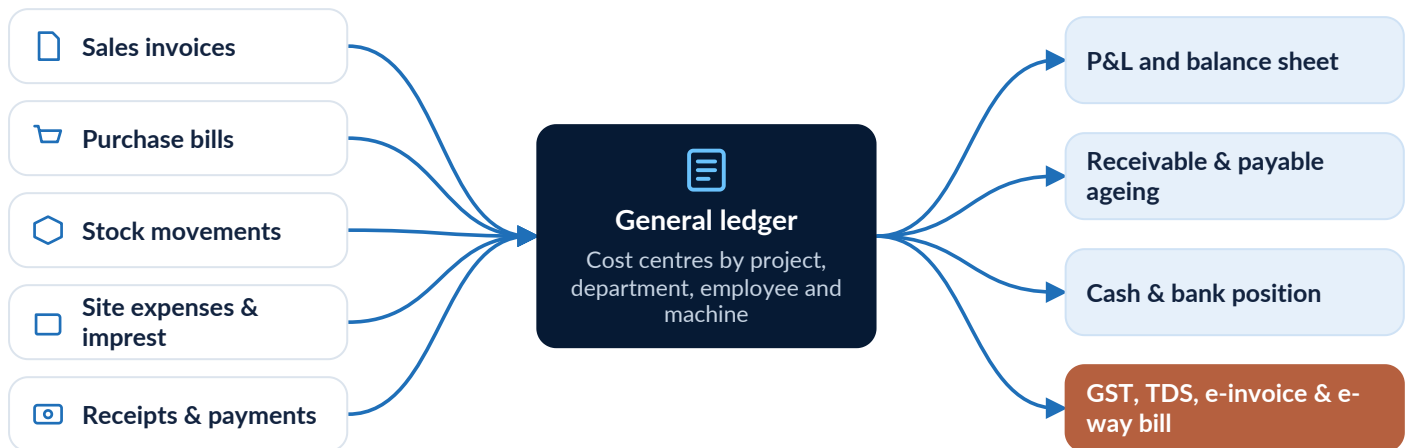
DATA FLOW TO THE LEDGER

Operations Post to Finance as They Happen

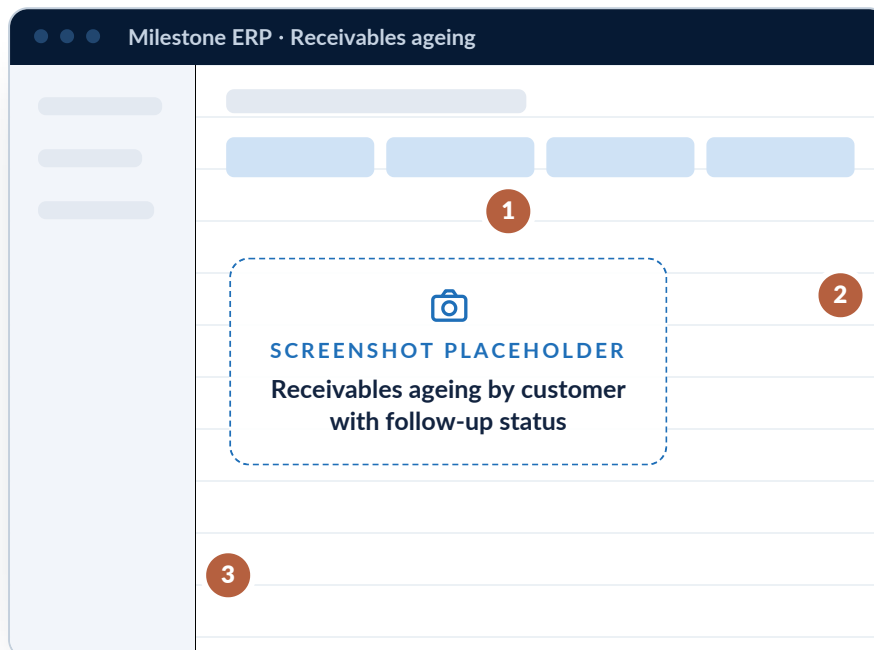
AR, AP, cash and bank, GL and cost centres fed by every operational document, with GST, TDS, e-invoice and e-way bill support.



INFORMATION FLOW



IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Ageing buckets by customer
- 2 Retention and disputed amounts
- 3 Drill down to the invoice

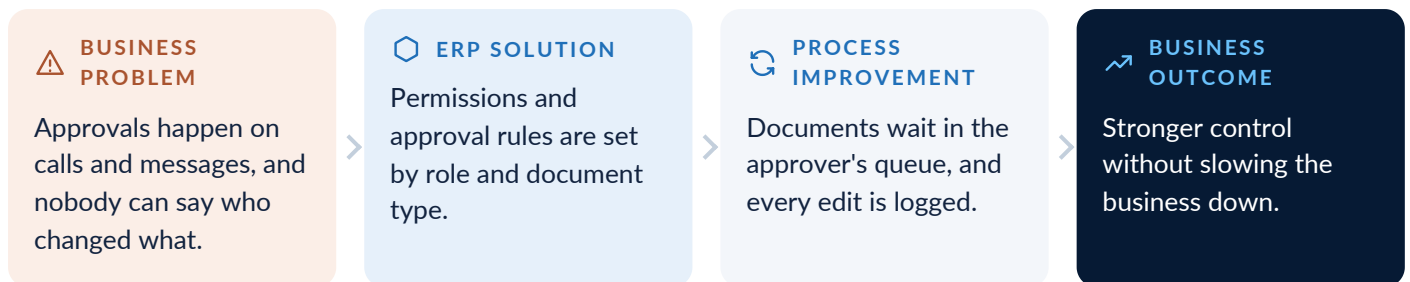
MEASURES TO WATCH

- ▼ Debtor days
- ▼ Days to close the month
- ▼ Unreconciled bank entries

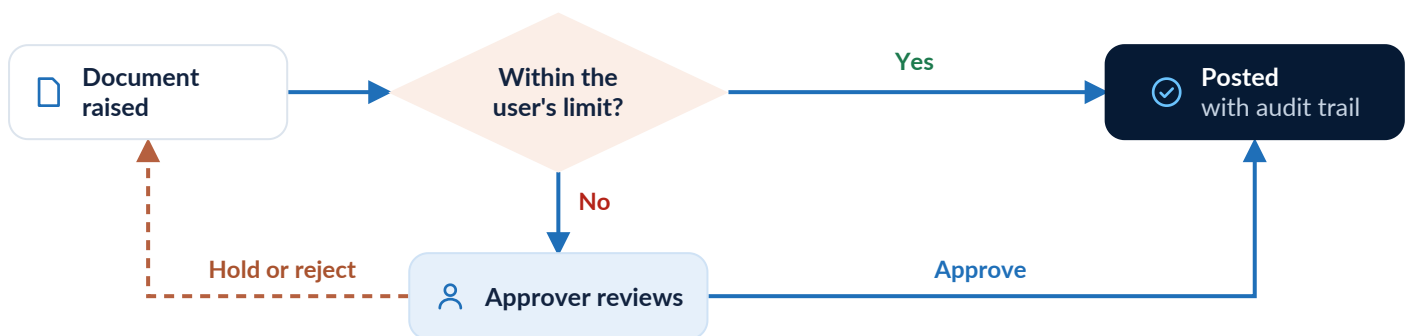
APPROVAL WORKFLOW

The Right People Approve. Every Change Is Recorded.

Role-based permissions, approval limits, hold and release, and an audit trail on every document.



APPROVAL FLOWCHART



CONTROLS

Role-based permissions

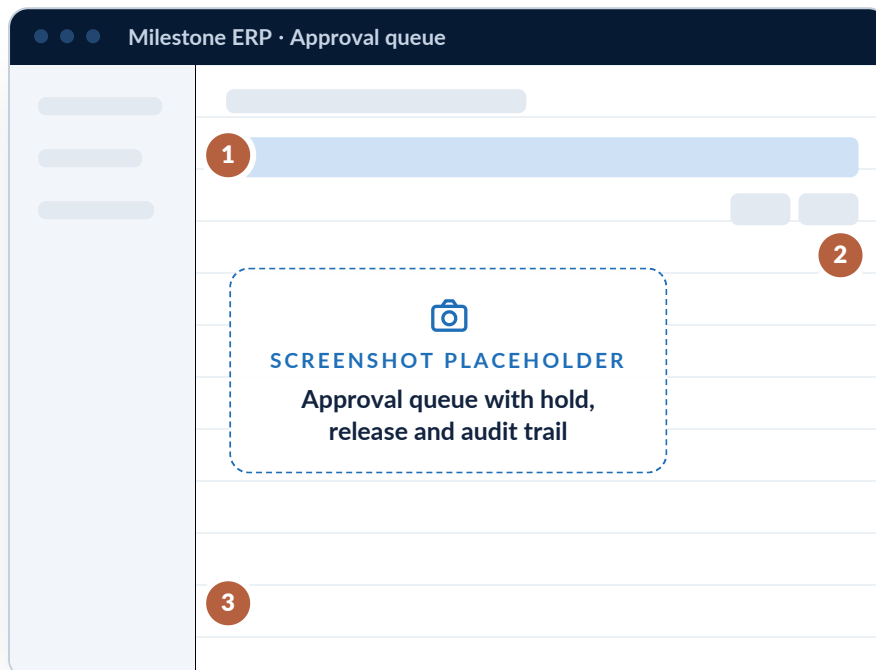
Approval limits

Hold and release

Audit trail

Exception alerts

IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 Pending approvals by document type
- 2 Hold and release with a reason
- 3 Audit trail on the document

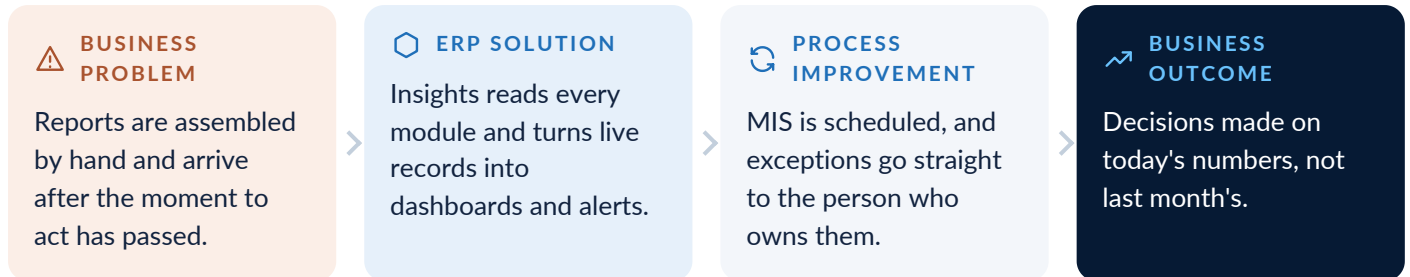
MEASURES TO WATCH

- Approval turnaround time
- Documents on hold
- Transactions within limits

EXECUTIVE DASHBOARDS

See What Needs Attention Now

Dashboards, scheduled MIS and exception alerts that move management from reviewing history to acting on today.



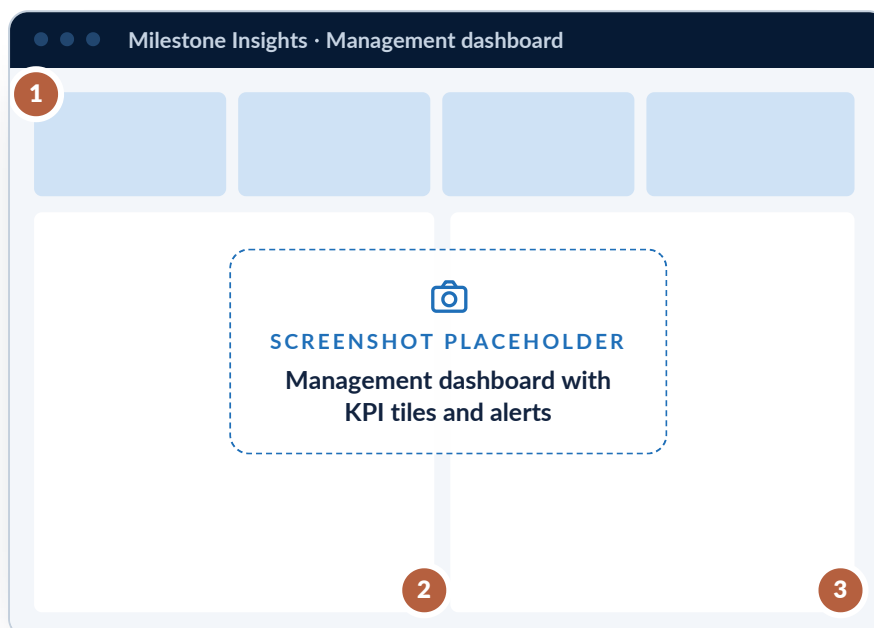
EXECUTIVE KPI COCKPIT



HOW AN EXCEPTION ALERT WORKS



IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 KPI tiles for sales, ageing, stock and WIP
- 2 Drill down from summary to document
- 3 Open exceptions with owners

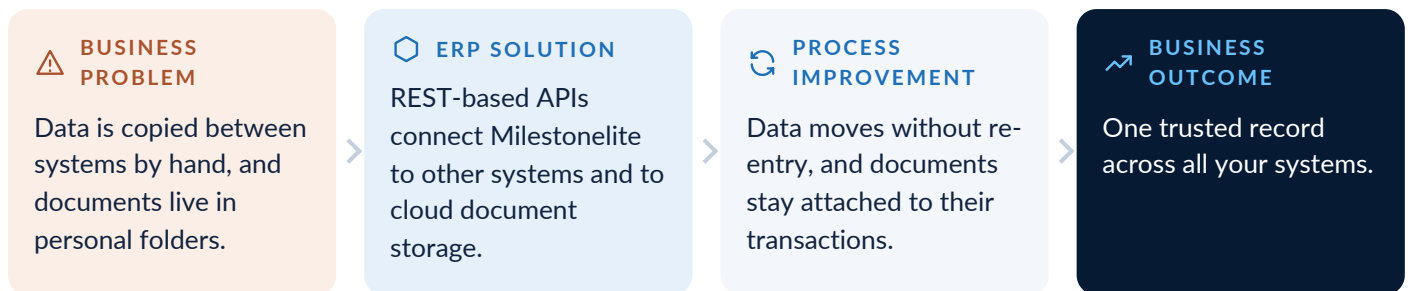
DELIVERED AS

- Dashboards
- Scheduled MIS
- Exception alerts

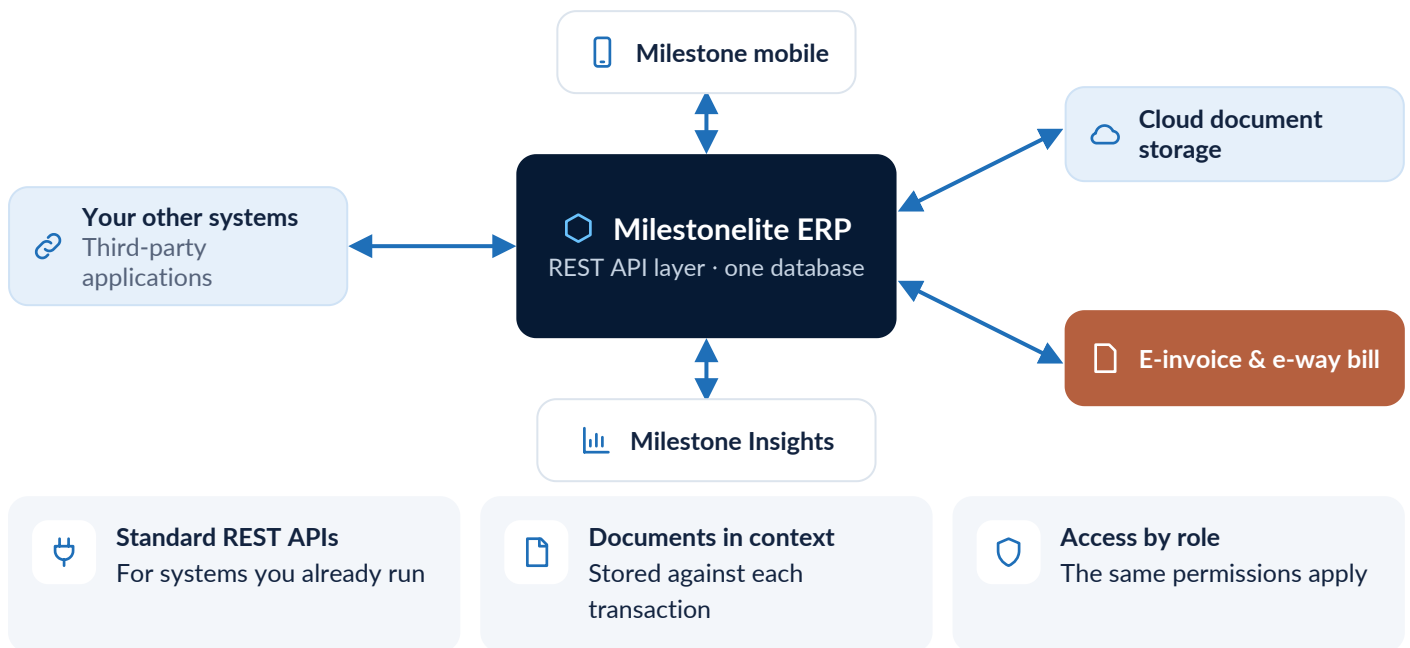
INTEGRATION ARCHITECTURE

Connect Milestone to the Rest of Your Business

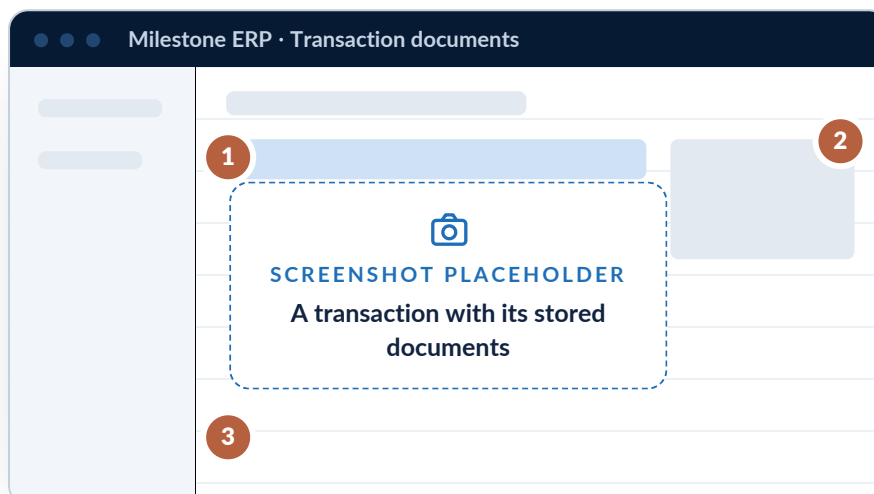
REST-based APIs link Milestonelite with your other systems, cloud document storage and compliance workflows.



INTEGRATION ARCHITECTURE



IN THE SOFTWARE



WHAT THE SCREEN SHOWS

- 1 The transaction and its details
- 2 Documents stored against it
- 3 Access controlled by role

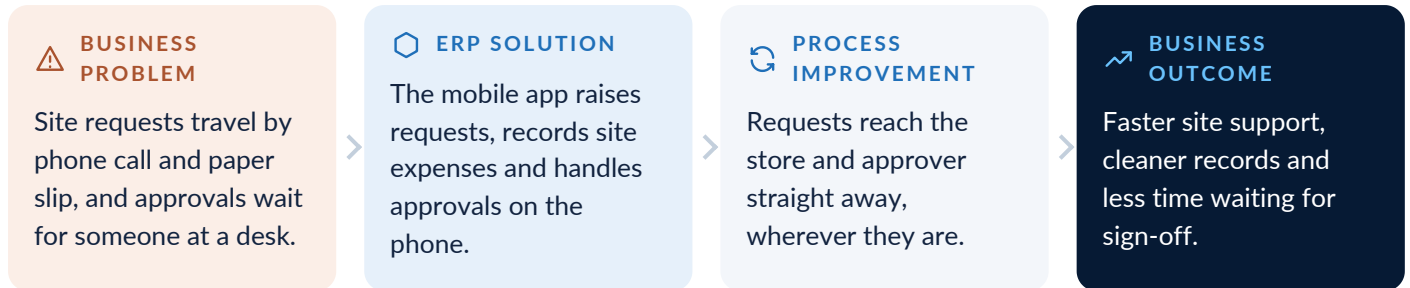
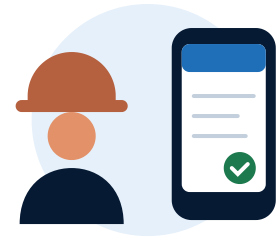
MEASURES TO WATCH

- ▼ Manual data re-entry
- ▼ Errors from copied data

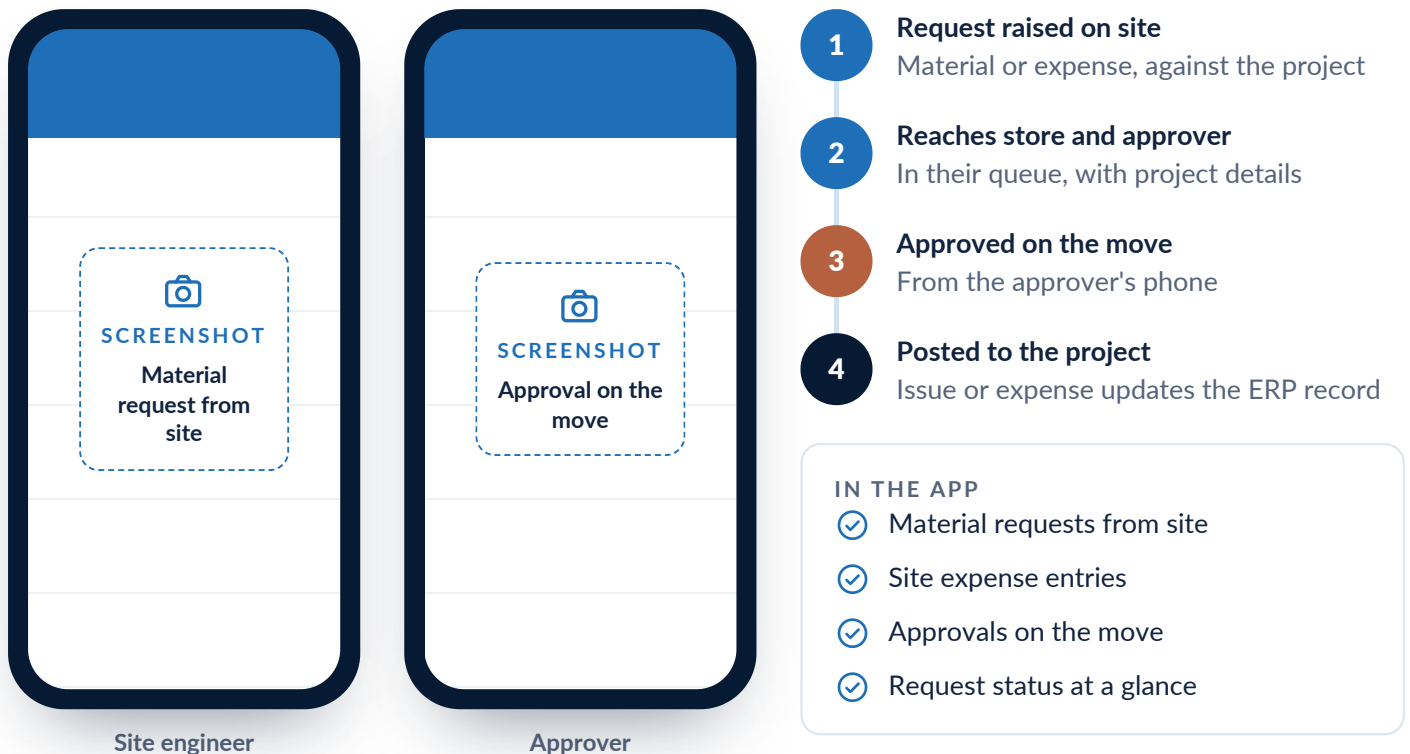
MOBILE WORKFORCE

Run the Site From Your Pocket

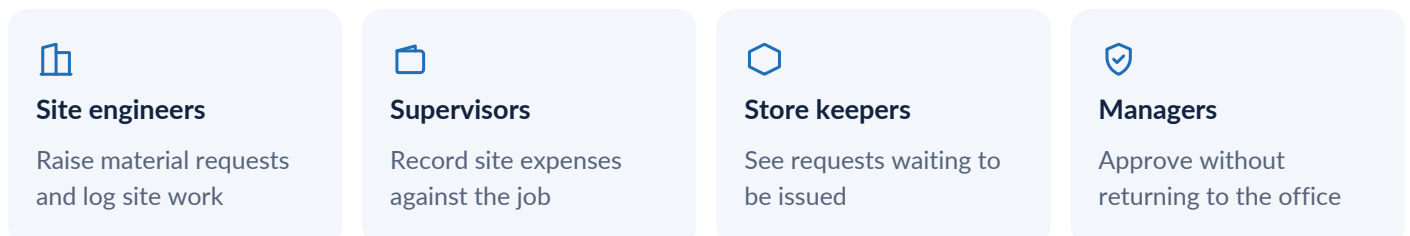
The Milestone mobile app puts material requests, site expenses and approvals in the hands of people on site and on the move.



FROM SITE TO OFFICE



WHO USES IT



Same records and same permissions as the ERP in the office.

VALUE FOR EVERY LEADER

Every Leader Gets the Answers They Own

Each decision-maker sees the numbers they are responsible for, drawn from the same live records as everyone else.

THE QUESTION EACH ROLE CAN ANSWER

 CEO Which projects, products and customers really make the margin? Margin by job Order book	 CFO How much cash is tied up, and in which receivables and stock? Ageing Cash & bank GST & TDS
 CIO / IT head Can we run one secure, connected system instead of many? Role-based access Audit trail REST APIs	 Operations manager Which orders and sites are at risk this week? Delivery commitments Bottlenecks
 Inventory manager What stock is idle, what is short and where is it? Stock by location Ageing Returnables	 Purchase manager Are we buying the right quantity, at the right rate, on time? Rate history Pending POs Vendor delivery
 Production manager Which stage is holding up output, and why? WIP by stage Rejections Machine history	 Business owner Is the business growing profitably, and is cash keeping up? Insights summary Exception alerts

DELIVERED THROUGH Role-based dashboards Scheduled MIS Exception alerts Drill-down to the document



Different questions. One source of truth behind every answer.

IMPLEMENTATION APPROACH

A Clear Path From First Study to Go-Live

Milestone configures the system around how your business already works, then stays with you after go-live.

IMPLEMENTATION ROADMAP



WHO DOES WHAT

	STUDY	CUSTOMIZE	TEST	IMPLEMENT	SUPPORT	ENHANCE
Milestone team	Study processes and reports	Configure rules, workflows and formats	Prepare test runs and close gaps	Load masters and train users	Resolve queries and issues	Build new reports and flows
Your team	Share documents and walk us through	Confirm rules and approvers	Run real transactions and sign off	Start daily work in Milestone	Raise requests as they come up	Tell us what to improve next

WHY MILESTONE

Since 2005
Building and supporting ERP from Mumbai

Configured, not forced
Fits complex project and manufacturing processes

One database
ERP, CRM and Insights on the same records

Compliance built in
GST, TDS, e-invoice and e-way bill



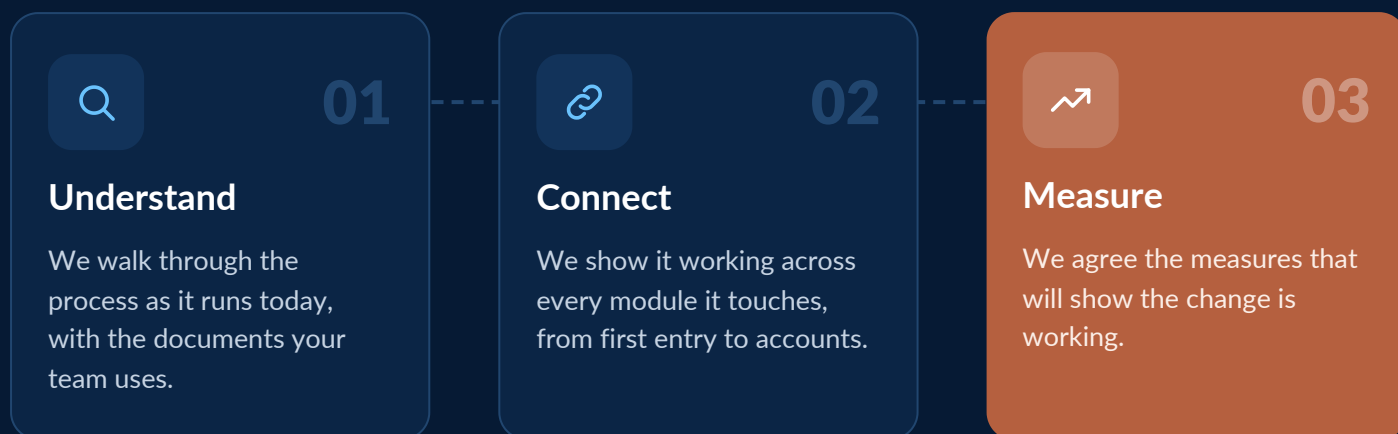
Start with one process. Prove it. Then extend across the business.

SEE IT ON YOUR OWN PROCESS

Bring Us One Live Process

Pick one process that costs you time today: a site request, a purchase approval or a production order. We will show it running end to end in Milestonelite ERP.

HOW THE SESSION WORKS



WHAT TO BRING

- ✓ Sample documents for the process
- ✓ The people who run it every day
- ✓ Where it slows down or goes wrong
- ✓ The report you wish you had

TALK TO US

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Principal Consultant

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🌐 www.milestonelite.com

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ONE CONNECTED SYSTEM

- Sales & orders
- CRM
- Procurement
- Inventory & warehouse
- Projects & contracts
- Manufacturing
- Outsourcing & job work
- Maintenance
- Finance & compliance
- Approval & security
- Milestone Insights
- APIs & integrations
- Milestone mobile