

Managing Referral Statuses and Milestones

From any page, in the top right there should be your name with an arrow pointing down next to it. Click this, and then click "Manage Settings".

Referral Statuses

At the top of the settings page, you will find "Referral Statuses". On the right, you can enter the title of the referral and then click "Create". It will then appear towards the left. You can then click on the three red lines next to it wherein you may edit the title or delete the status.

Milestones

At the bottom of the settings page, you will find "Milestones". From here, you can click "Create new milestone". You can then enter the milestone name, the slug (which is a unique identifier for grant reporting. and a description of the milestone. Then, click "Add". It will then appear to the right. From there, you may delete or edit it.

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