



FAQs

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Common Links

[Support Resources](#)

[Support: Admin Guide](#)

[Milestones PM+ Starter Packs](#)

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[App: Release notes](#)

[App: Release process](#)

[App: Security FAQs](#)

[Read: Salesforce Project App Comparison](#)

What Salesforce editions and licenses are compatible with Milestones PM+?

Milestones PM+ can be installed with Professional Edition and up, including special force.com editions, on any Salesforce Cloud with AppExchange permissions. Salesforce access is required to use Milestones PM+, so a license is required for each user.

No Salesforce? No problem – Passage Technology offers discounted licenses with purchase of Milestones PM+ Premium Edition, so anyone needing a Salesforce account to use the app can get one affordably. If you're unsure about compatibility or having trouble with installation, [contact us](#).

How does installing an app like Milestones PM+ work?

Very easily: [Click "Get It Now" on the AppExchange](#). It's free, no payment asked, and takes three steps in less than five minutes. Or, get a quick peek instantly with a [test drive](#), a fully functional demo as a read-only user.

Learn more: [Installing from the AppExchange](#) | [\[Salesforce\] Install Guide](#)

Can Project templates be used across environments?

Yes. Disable the "Keep Template Assignments" custom setting, then create your templates. Otherwise, record owner IDs (saved to the template) won't match between environments and the import will fail.

Will Milestones PM+ interfere with other applications or deployments?

No, in general Milestones PM+ runs in its own "namespaced" managed package.

Managed package code is not included in the required code coverage calculation for deployment. The 75% requirement is on all Apex code in your org's namespace. Managed code has its own namespace, so it is not included.

When deploying to production, all tests in your org's namespace will be run. Managed tests will not be run by default. If the deployment package explicitly marks runAllTests to true, managed tests will also run. These will need to execute without any failures should the flag be set. Despite this, the 75% requirement for code coverage is still only on unmanaged code.

Can non-Salesforce users access the app and update Tasks?

As a Salesforce app, Milestones PM+ can only be accessed by users in your org/Salesforce account. To allow current non-users access to Milestones PM+, Salesforce licenses are required. They are available to purchase [from Passage Technology](#) or your Salesforce Account Executive (AE). For other non-user options, contact us.

Can non-Salesforce users be Resources?

Yes. [Learn more about Resource Management with Milestones PM+](#).

Are there pre-built reports that can be cloned and customized?

Yes. Because Milestones PM+ is native to Salesforce, full reporting and dashboard functionality can be used including embedded analytics to display charts on any of the records.

If you need assistance with creating custom reports, consider the following resources or [schedule a consultation](#).

- [Salesforce Help](#)
- [\[Trailhead\] Reports & Dashboards](#)

Can Milestones PM+ be used for Program and Portfolio Management?

Yes. A **Program** has multiple related Projects, each of which can only be part of one Program. A **Portfolio** has multiple related Projects, each of which can be part of more than one Portfolio.

What about document management?

Milestones PM+ can seamlessly integrate with Salesforce document capabilities including Quip, Chatter files, Content records, and more. The app doesn't have extensive built-in document features.

How do predecessor/successor dependencies work?

Successor Milestone: Stage 1 Scoping

Predecessor Milestone: Stage 0 Discovery

Predecessor/successor dependencies are used to depict that one item (successor) relies on the completion of another item (predecessor) in order to progress.

A successor can only have one predecessor, and they must be on the same parent (Tasks share a Milestone, Milestones share a Project). To link multiple predecessors, it's recommended those predecessor Tasks be grouped into a separate Milestone, then the link that new Milestone to the successor Task's Milestone. For further customization, [Milestones PM+ Starter Packs](#) are convenient services to set up your app.

Date Shifts

"Date Shift": Changing Start and End Dates while maintaining duration.

"Duration": Number of days between Start and End Dates.

If a predecessor Milestone Start Date is changed, its End Date will move with it so that the Milestone duration is the same. This numerical shift will cascade to successor dates, of which will also maintain their durations.

Use case: [Date Shifting Project Start/Finish while Keeping Duration](#)

Milestones PM+ has many options for various date configurations and can be customized for more specific behaviors. Consider [Milestones PM+ Starter Packs](#) or [a FREE consultation](#) today.

What are parent/child Milestone relationships?

Parent/child relationships are used to group (child) Milestones belonging to a (parent) Milestone. Unlike predecessor/successor, parent/child aren't dependent on the completion of others to make progress.

Optional, use the 'Parent Milestone' lookup field to enable.

Notes: (1) Parent/child relationships don't display on the Gantt chart by default, as predecessor/successor dependencies do. To customize the Gantt chart to show parent/child links or other enhancements, [schedule a FREE consultation](#). (2) Some Rollup Summary fields are specifically for this use case and will not be calculated if A, Parent Milestone isn't utilized, and B, these fields are on the Milestone page layout.



f X in 
@passagetech



sales@passagetech.com
www.passagetech.com

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