

Dynamic Milestone Manager: Admin Initial Setup Steps

Add “Milestones” field to Global Action Layouts

- Go to Setup > Global Actions
- Edit the layout for:
 - Event
 - Task
 - Log a Call
- Add the “Milestones” field to each layout
- **Save each layout**

Add “Milestones” field to Object Page Layouts

- Go to Setup > Object Manager
- Search for “Event” and select Event Layout
- Drag the “Milestone” field into the layout
- **Save**
- Search for “Task” and select Task Layout
- Drag the “Milestone” field into the layout
- **Save**
- Search for “Email Message” and select Email Message Layout
- Drag the “Milestone” field into the layout
- **Save**

Set Up High-Value Keywords

- Go to Setup > Custom Metadata Types
- Click **Manage Records** next to *Activity Tracker Setting*
- Edit and input comma-separated keywords
- **Save**

- Click **Manage Records** next to *Phone Call Tracking*
- Edit and input comma-separated keywords
- **Save**

Adding Dynamic Milestone Manager & Activity Tracker Components to Lightning Pages

- For each desired page layout, navigate to any record where you want to add the components
- Click the Setup Gear (top right navigation) > Click on “Edit Page”
- In the left panel, search for *Dynamic Milestone Manager*
- Drag it into the second-largest section (wide column, not full-width or sidebar)
- In the same left navigation, scroll down to *Custom - Managed* to find *Activity Tracker*
- Drag *Activity Tracker* into a sidebar or mid-size section
- **Save the page and activate if needed**

Layout Tips

- Dynamic Milestone Manager should go in a mid-to-large region—not full-width, not sidebar
- Activity Tracker can go in a sidebar or secondary region
- Feel free to experiment with placement to see what fits your workflow