

Platform Guide - Extended Sections

Milestones, Escrow & GMV Explained

This document extends the main Platform Guide with detailed explanations of:

- Milestone System (for large projects)
- Escrow System (payment protection)
- GMV (Gross Merchandise Value) and where it appears

Table of Contents

1. [Milestone System Overview](#)
2. [When to Use Milestones vs Standard Orders](#)
3. [Milestone Customer Journey](#)
4. [Milestone Provider Journey](#)
5. [Escrow System Explained](#)
6. [GMV - Where It Appears](#)
7. [UI/UX - Pages & Sections for Milestones](#)
8. [Implementation Guide](#)

1. Milestone System Overview

What is a Milestone?

A **Milestone** is a checkpoint in a large project. Instead of one big payment and one big delivery, the project is split into stages. Each stage has:

WHAT MAKES UP A MILESTONE

MILESTONE 2: Design Phase

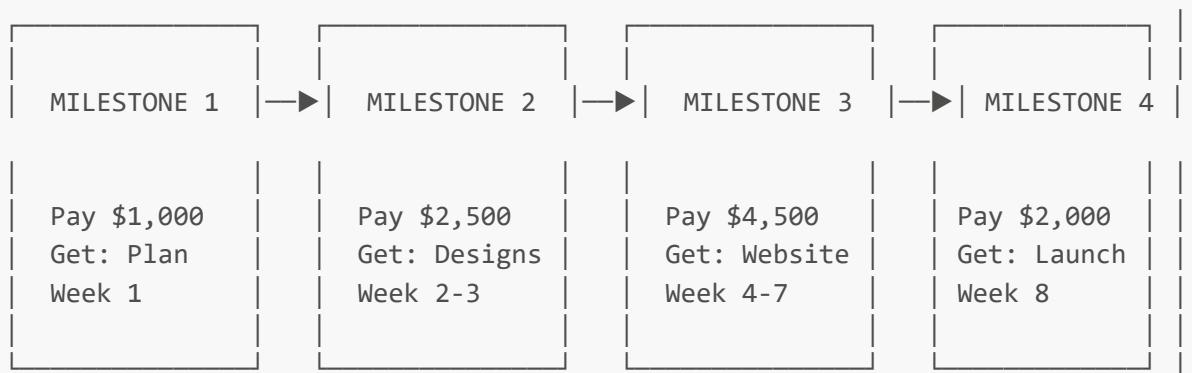
	NAME & DESCRIPTION
	"Design Phase" - Create all visual designs for the website
	AMOUNT
	\$2,500 (25% of \$10,000 total project)
	DURATION
	2 weeks (Week 2-3 of project)
	DELIVERABLES (What customer receives)
	<ul style="list-style-type: none">• Homepage wireframe• Inner page wireframes (5 pages)• High-fidelity UI designs• Interactive prototype (Figma)• Design system documentation
	STATUS
	Pending → Funded → In Progress → Delivered → Approved

Standard Order vs Milestone Project





MILESTONE PROJECT (Large Service)



FOUR payments, FOUR deliveries
Total: \$10,000 over 8 weeks

2. When to Use Milestones vs Standard Orders

Decision Matrix

Criteria	Standard Order	Milestone Project
Price	Under \$500	\$500+ (typically \$1,000+)

Criteria	Standard Order	Milestone Project
Duration	1-7 days	2+ weeks
Complexity	Single deliverable	Multiple deliverables
Risk Level	Low	High
Payment	One upfront	Staged payments
Customer Control	Limited	High (pause/cancel anytime)

Services That Need Milestones

SERVICES REQUIRING MILESTONES

WEB DEVELOPMENT

- Full website (\$3,000 - \$50,000)
- E-commerce platform (\$5,000 - \$100,000)
- Web application (\$10,000 - \$200,000)

MOBILE APP DEVELOPMENT

- iOS app (\$10,000 - \$100,000)
- Android app (\$10,000 - \$100,000)
- Cross-platform (\$15,000 - \$150,000)

COMPLETE BRAND IDENTITY

- Logo + Brand guide + Collateral (\$2,000 - \$20,000)
- Full rebrand (\$5,000 - \$50,000)

VIDEO PRODUCTION

- Corporate video series (\$5,000 - \$50,000)
- Animated explainer package (\$3,000 - \$30,000)

BUSINESS SERVICES

- Company registration package (\$1,500 - \$10,000)
- Legal documentation (\$2,000 - \$15,000)
- Business plan + Pitch deck (\$1,000 - \$5,000)

3. Milestone Customer Journey

Complete Step-by-Step Flow

Step 1: Customer Views Service with Milestones

SERVICE PAGE - WITH MILESTONE INDICATOR

URL: pixelcraft.com/services/website-development

WEBSITE DEVELOPMENT

From \$3,000 • Delivery: 4-12 weeks

☒ THIS IS A MILESTONE PROJECT

Large projects are divided into milestones for your protection:

- ✓ Pay as you go - only fund one milestone at a time
- ✓ Review at each checkpoint - approve before moving forward
- ✓ Full control - pause or cancel anytime
- ✓ Protected payments - held in escrow until you approve

CHOOSE YOUR PACKAGE:

STARTER

\$3,000

5 pages

3 milestones

4 weeks

[Select]

BUSINESS ★

\$10,000

15 pages

4 milestones

8 weeks

[Select] ✓

ENTERPRISE

\$25,000

Unlimited

6 milestones

12 weeks

[Select]

MILESTONE BREAKDOWN (Business Package - \$10,000):

#	Phase	Amount	Duration	You Pay
1	Discovery & Planning	\$1,000	1 week	NOW
2	Design	\$2,500	2 weeks	After M1
3	Development	\$4,500	4 weeks	After M2
4	Launch & Handover	\$2,000	1 week	After M3
Total		\$10,000	8 weeks	

💡 You only pay \$1,000 today to start Milestone 1!

[Start Project - Fund Milestone 1: \$1,000]

KEY POINT: Customer sees exactly what they pay NOW vs LATER

Step 2: Customer Checkout (First Milestone Only)

CHECKOUT - MILESTONE PROJECT

FUND MILESTONE 1

PROJECT OVERVIEW

Website Development
Business Package

TODAY'S PAYMENT

Funding: MILESTONE 1 ONLY

Total Project: \$10,000
Milestones: 4

M1: Discovery & Planning

Duration: 8 weeks

Amount: \$1,000

Duration: 1 week

Deliverables:

PAYMENT SCHEDULE:

- Requirements document

- Technical specification

M1: \$1,000 ← TODAY

- Sitemap

M2: \$2,500 (after M1)

- Project timeline

M3: \$4,500 (after M2)

M4: \$2,000 (after M3)

	Milestone 1: \$1,000.00	
	Platform Fee (5%): \$50.00	
	<hr/>	
	TOTAL DUE TODAY: \$1,050.00	
	<hr/>	
	Payment held in ESCROW until	
	you approve M1 delivery	
	<hr/>	
	PAYMENT METHOD	
	• Credit Card <input type="radio"/> PayPal	
	<hr/>	
	[_____]	Card Number
	[__/__/__] [__]	Expiry / CVV
	<hr/>	
	<input checked="" type="checkbox"/> I understand this is a milestone project	
	<input checked="" type="checkbox"/> I agree to fund each milestone when the previous is approved	
	<hr/>	
	[Fund Milestone 1 - \$1,050.00]	
	<hr/>	
	IMPORTANT: Customer pays ONLY \$1,050 today (not \$10,000)	
	<hr/>	

Step 3: Customer Project Dashboard

PROJECT DASHBOARD - CUSTOMER VIEW
<hr/>
URL: /projects/PRJ-2025-001234

PROJECT: E-Commerce Website Development
#PRJ-2025-001234 • Provider: WebDev Pro Agency

OVERALL PROGRESS



⌚ Budget: \$3,500 / \$10,000 paid

📅 Timeline: Week 3 of 8

🎯 Current: Milestone 2 (Design)

MILESTONES

MILESTONE 1: Discovery & Planning COMPLETED

Amount: \$1,000 • Paid ✓ • Released to provider ✓

Completed: January 10, 2025

Deliverables received:

[📄 Requirements.pdf] [📄 Sitemap.pdf] [📄 Timeline.pdf]

	 MILESTONE 2: Design	IN PROGRESS	
	Amount: \$2,500 Payment:  FUNDED (Held in Escrow) Deadline: January 24, 2025 (5 days left)	 CURRENT	
	Progress: <div style="width: 60%;"><div style="background-color: black; width: 100%; height: 10px;"></div><div style="background-color: #ccc; width: 40%; height: 10px;"></div></div> 60%		
	Latest update from provider: "Wireframes complete! Starting high-fidelity designs today."		
	[Chat with Provider] [View Progress]		
	 MILESTONE 3: Development	NOT STARTED	
	Amount: \$4,500 Payment:  Not yet funded (fund after M2 approval) Expected: Jan 25 - Feb 21, 2025		
	 MILESTONE 4: Launch & Handover	NOT STARTED	
	Amount: \$2,000 Payment:  Not yet funded Expected: Feb 22 - Feb 28, 2025		

Step 4: Milestone Delivery & Approval

MILESTONE DELIVERY - CUSTOMER REVIEW SCREEN

Provider has submitted Milestone 2 delivery

MILESTONE 2 DELIVERY SUBMITTED

WebDev Pro has completed Milestone 2: Design
Please review and approve, or request revisions.

DELIVERABLES CHECKLIST

PROMISED

DELIVERED

- Homepage wireframe
- Inner page wireframes (5)
- High-fidelity UI designs
- Interactive prototype
- Design system docs

- ✓ Homepage-Wireframe.pdf
- ✓ 5 wireframe files
- ✓ UI-Designs.fig (Figma)
- ✓ Figma prototype link
- ✓ Design-System.pdf

DELIVERED FILES

- 📁 Design-Deliverables.zip (45.2 MB)
 - └─ Wireframes/ (6 files)

UI-Designs/ (Figma files)
Prototype-Link.txt
Design-System.pdf

[Download All Files] [Preview Files]

PROVIDER'S MESSAGE

"Hi! I've completed all design deliverables. The interactive prototype lets you click through the entire user flow. Let me know if you'd like any revisions before we start development!"

YOUR DECISION

REQUEST REVISION

Need changes before approving.

- Provider revises
- Payment stays in escrow

[Request Revision]

APPROVE MILESTONE ✓

I'm satisfied with delivery

This will:

- Release \$2,500 to provider
- Unlock Milestone 3
- Prompt you to fund M3

[Approve & Continue →]

Step 5: Fund Next Milestone

FUND NEXT MILESTONE - AFTER APPROVAL

MILESTONE 2 APPROVED!

\$2,500 has been released to WebDev Pro.

READY FOR MILESTONE 3?

To continue the project, fund the next milestone:

MILESTONE 3: Development

Amount: \$4,500

Duration: 4 weeks (Jan 25 - Feb 21)

Deliverables:

- Fully functional frontend
- Backend/CMS integration
- Payment gateway
- Testing report

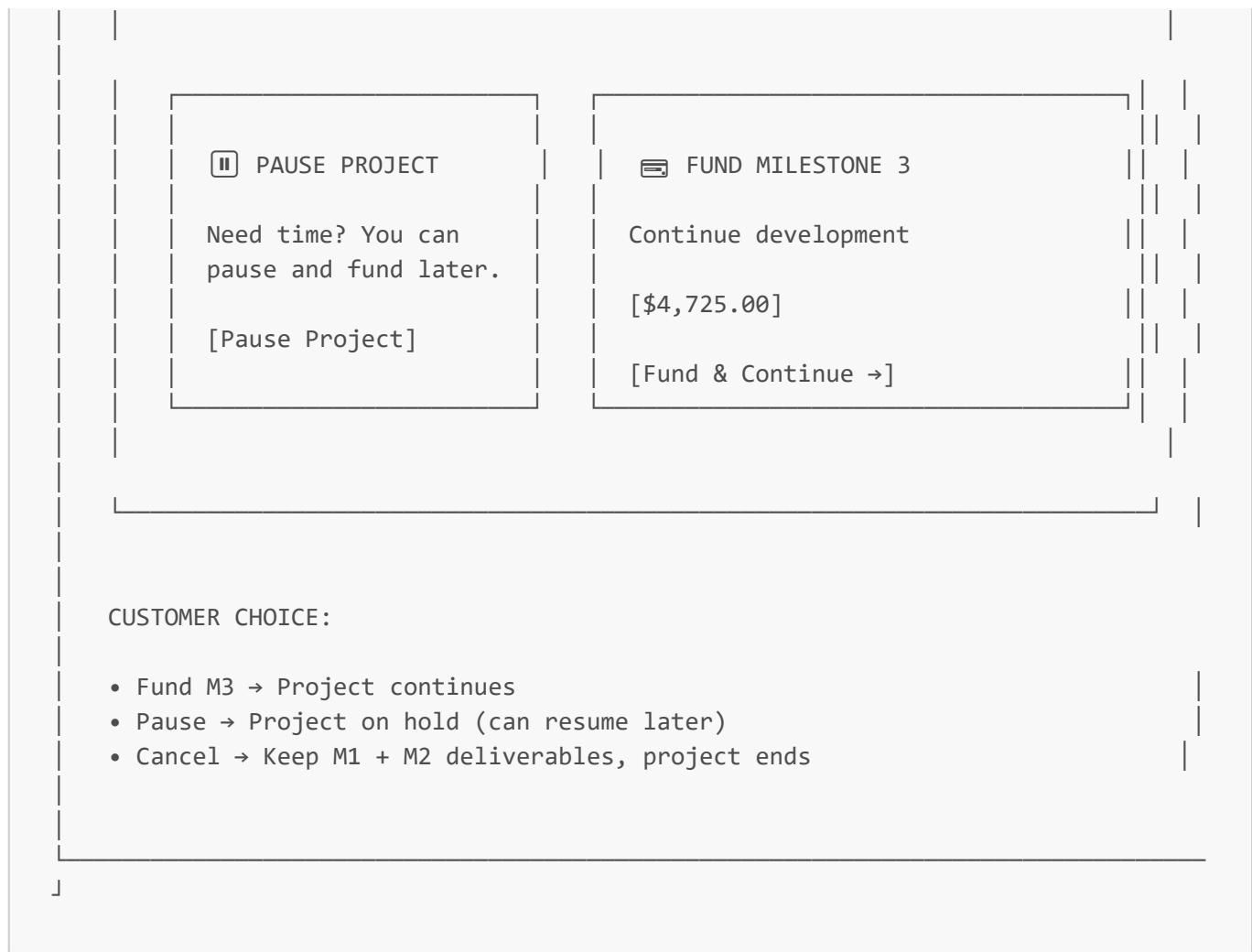
Milestone Amount: \$4,500.00

Platform Fee (5%): \$225.00

Total: \$4,725.00

 Charge to: Visa ****4242

[Use Different Card]



CUSTOMER CHOICE:

- Fund M3 → Project continues
- Pause → Project on hold (can resume later)
- Cancel → Keep M1 + M2 deliverables, project ends

4. Milestone Provider Journey

Provider Dashboard for Milestone Projects



				Client: John's Store			
		John's		Total: \$10,000 • Duration: 8 weeks			
		E-Commerce					
		M2 Active					
		\$2,500 					
				CURRENT MILESTONE: M2 - Design			
		Sarah's					
		Website		Status: IN PROGRESS			
		M1 Pending		Amount: \$2,500 (Funded ✓)			
		\$800 		Deadline: Jan 24 (5 days left)			
				My Progress:  60%			
		MY EARNINGS		[Update Progress]			
		This Month: \$4,750					
		Pending: \$2,500 (M2 in escrow)		DELIVERABLES CHECKLIST:			
				<input checked="" type="checkbox"/> Homepage wireframe			
				<input checked="" type="checkbox"/> Inner page wireframes			
				<input type="checkbox"/> High-fidelity UI designs			
				<input type="checkbox"/> Interactive prototype			
				<input type="checkbox"/> Design system docs			
				ALL MILESTONES:			
				<input checked="" type="checkbox"/> M1: \$1,000 DONE (Paid ✓)			
				 M2: \$2,500 IN PROGRESS (Funded ✓)			
				 M3: \$4,500 WAITING			
				 M4: \$2,000 WAITING			



Provider Submits Milestone Delivery

The screenshot shows the 'SUBMIT MILESTONE DELIVERY - PROVIDER VIEW' interface. At the top, there is a header bar with three buttons: 'Chat' (with a speech bubble icon), 'Upload Files' (with a folder icon), and 'Submit M2' (with a checkmark icon). Below the header, there is a large, empty rectangular area for file uploads. A horizontal line separates this from the 'DELIVERABLES CHECKLIST'. The checklist title is 'SUBMIT DELIVERY: MILESTONE 2 - Design'. Below the title, there is a list of deliverables with checkboxes and status indicators:

Deliverable	Status
Homepage wireframe	[✓ Uploaded]
Inner page wireframes (5 pages)	[✓ Uploaded]
High-fidelity UI designs	[✓ Uploaded]
Interactive prototype (Figma)	[✓ Link Added]
Design system documentation	[✓ Uploaded]

UPLOADED FILES			
Design-Package.zip	45.2 MB	✓	
Prototype-Link.txt	1 KB	✓	
[+ Add More Files]			
<hr/>			
DELIVERY MESSAGE TO CLIENT			
<div style="border: 1px solid black; padding: 10px;"><p>Hi John! I've completed all design deliverables for Milestone 2. The interactive prototype lets you click through the entire user flow. Let me know if you need any revisions!</p></div>			
<hr/>			
<p> IMPORTANT:</p>			
<p>When client approves, \$2,500 will be released to your account. If revisions are requested, you'll need to update and resubmit.</p>			
<p>[Submit Milestone 2 Delivery]</p>			
<hr/>			

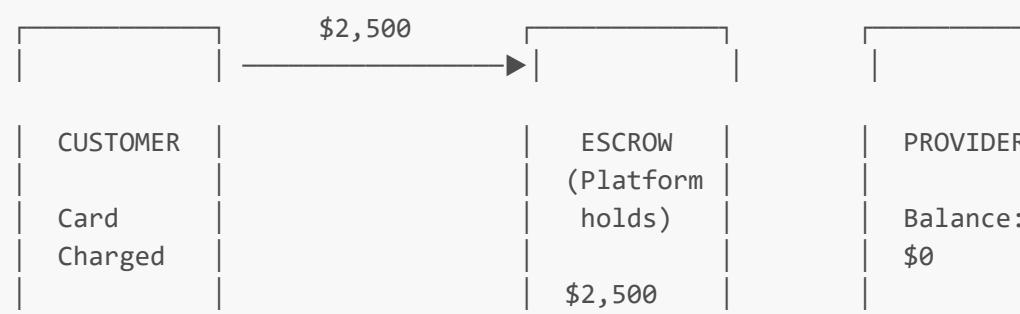
5. Escrow System Explained

What is Escrow?

Escrow = The platform holds the customer's payment in a secure account until conditions are met (delivery approved). Neither customer nor provider can access the money until the work is done.

HOW ESCROW WORKS

STEP 1: CUSTOMER FUNDS MILESTONE



Money is SAFE - neither party can touch it

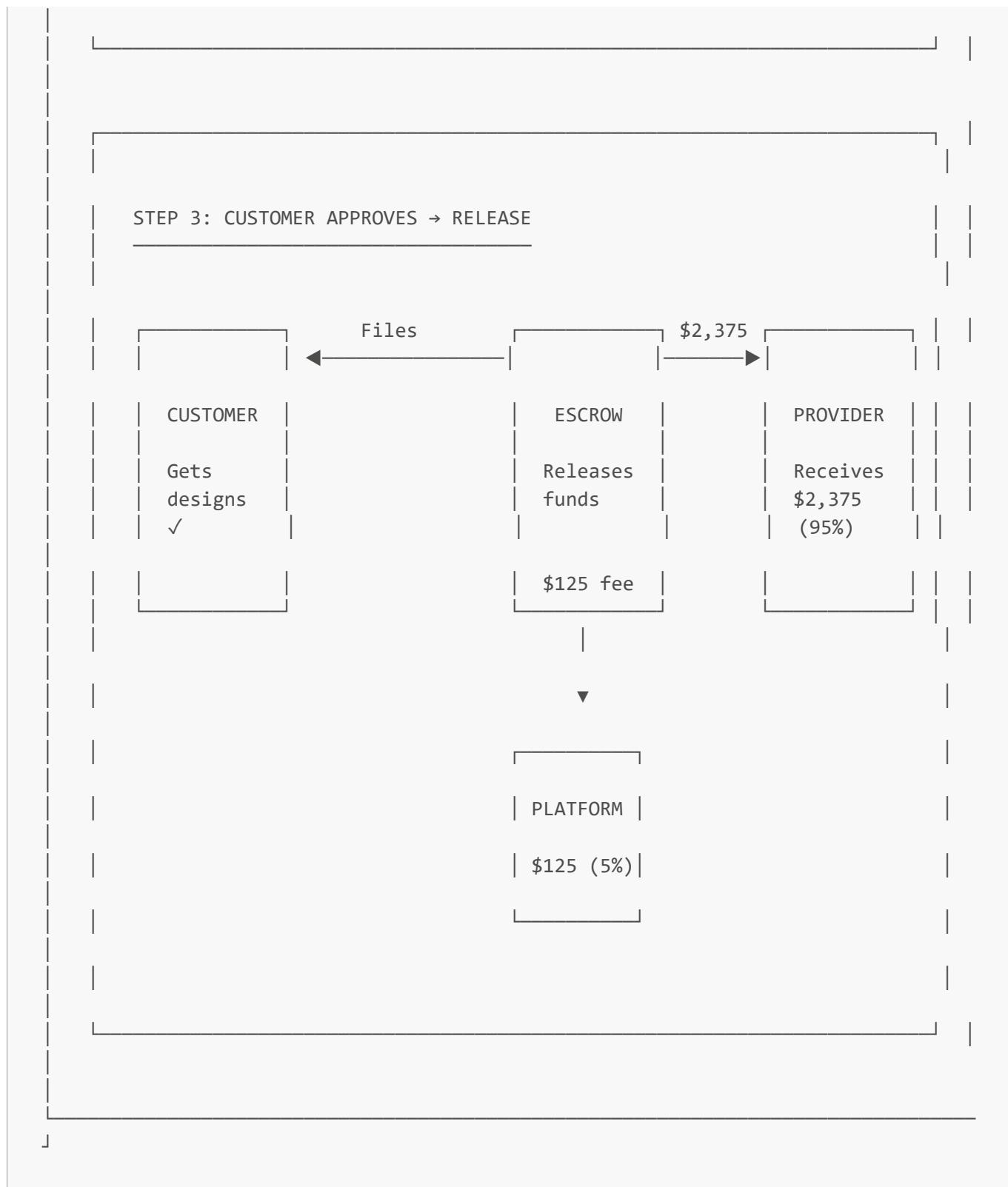
STEP 2: PROVIDER WORKS

CUSTOMER
Waiting
for
delivery

ESCROW
Holding
\$2,500

PROVIDER
Working
on
designs

Provider confident: payment guaranteed when approved
Customer confident: money protected until satisfied



Escrow Protection Scenarios

PROTECTION SCENARIOS

SCENARIO 1: Provider doesn't deliver

- \$2,500 in escrow
- Provider fails to deliver by deadline
- Customer raises dispute
- Admin reviews → REFUND to customer

CUSTOMER PROTECTED

SCENARIO 2: Customer refuses valid work

- Provider delivered all promised items
- Customer refuses to approve (trying to get free work)
- Provider raises dispute
- Admin reviews deliverables → RELEASE to provider

PROVIDER PROTECTED

SCENARIO 3: Project cancelled mid-way

Project: \$10,000 total (4 milestones)

- M1: \$1,000 - Completed ✓ (Provider paid)
- M2: \$2,500 - Completed ✓ (Provider paid)
- M3: \$4,500 - Customer cancels here

- M4: \$2,000 - Never started

Result:

- Customer paid: \$3,500 (keeps M1 + M2 deliverables)
- Customer saved: \$6,500 (didn't continue)
- Provider received: \$3,500 for completed work

FAIR FOR BOTH PARTIES

Where Escrow Status Appears

ESCROW STATUS VISIBILITY

CUSTOMER SEES:

MILESTONE 2: Design

Amount: \$2,500

Payment:  FUNDED (Held in Escrow) ← Customer sees this

Your payment is protected until you approve the delivery.

PROVIDER SEES:

MILESTONE 2: Design
Amount: \$2,500
Payment: ⚡ FUNDED (In Escrow) ← Provider sees this

Payment guaranteed - will be released when client approves.

TENANT ADMIN SEES:

PROJECT #PRJ-2025-001234

Financial Summary:
└ M1: \$1,000 - Released ✓
└ M2: \$2,500 - In Escrow ⚡
└ M3: \$4,500 - Not Funded
└ M4: \$2,000 - Not Funded

Total in Escrow: \$2,500
Total Released: \$1,000

6. GMV - Where It Appears

What is GMV?

GMV (Gross Merchandise Value) = Total value of all transactions processed through the platform. This is a platform-level metric, NOT visible to customers.

GMV EXPLAINED

GMV = Total dollar amount of all orders + bookings

Example:

- └─ PixelCraft (Tenant 1): \$50,000 in orders this month
- └─ CoachPro (Tenant 2): \$25,000 in bookings this month
- └─ WebDev Agency (Tenant 3): \$100,000 in orders this month
- └─ Total Platform GMV: \$175,000

YOUR REVENUE (Platform Owner):

- └─ 5% of GMV = \$8,750 this month

Where GMV Appears

GMV VISIBILITY BY ROLE

👤 CUSTOMER

GMV Visible: ✗ NO

Customers see:

- Their own order amounts
- Their payment history
- Individual order costs

NOT: Platform-wide transaction volumes

👤 PROVIDER

GMV Visible: ✘ NO

Providers see:

- Their personal earnings
- Their completed orders
- Pending payments in escrow

NOT: Other providers' earnings or total business volume

👤 TENANT ADMIN (Business Owner)

GMV Visible: ☑ YES (Their business only)

Tenant Admins see:

- Total revenue for their business
- Orders/bookings volume
- Provider performance
- Business analytics

TENANT ADMIN DASHBOARD

This Month:

- Revenue: \$28,450
- Orders: 47
- Avg Order: \$605
- Platform Fees Paid: \$1,422

👤 SUPER ADMIN (Platform Owner - YOU)

GMV Visible: YES (Full Platform)

Super Admin sees EVERYTHING:

- Platform-wide GMV
- GMV by tenant
- Platform revenue (fees collected)
- Growth trends

SUPER ADMIN DASHBOARD

Total Tenants

156
↑ 12%

Active Users

12,450
↑ 8%

Platform Revenue

\$45,230
↑ 15%

Total GMV

\$904,600
↑ 22%

Platform Revenue = 5% of GMV

\$45,230 = 5% × \$904,600 ✓

TOP TENANTS BY GMV:

1. PixelCraft Studio	\$125,000	(13.8%)
2. WebDev Pro Agency	\$98,500	(10.9%)
3. CoachPro	\$76,200	(8.4%)
4. ContentKing	\$54,800	(6.1%)
5. DesignHub	\$48,300	(5.3%)

GMV vs Revenue

GMV vs REVENUE - UNDERSTANDING THE DIFFERENCE

GMV (Gross Merchandise Value)

- Total value of ALL transactions on the platform
- Includes: Order amounts + Booking amounts
- NOT your revenue (most goes to providers/tenants)

Example: Customer pays \$1,000 for logo
GMV increases by \$1,000

PLATFORM REVENUE (Your Money)

- Your commission from each transaction
- Typically 5-15% of GMV
- THIS is your actual income

Example: Customer pays \$1,000 for logo
Platform Revenue = \$50 (5% commission)
Provider gets = \$950

CALCULATION:

Platform GMV (Monthly):	\$904,600
Platform Fee:	5%
<hr/>	
Platform Revenue:	\$45,230 ← YOUR income

Where the rest goes:
• Providers (via tenants): \$859,370 (95%)

7. UI/UX - Pages & Sections for Milestones

New Pages Required for Milestones

PAGES REQUIRED FOR MILESTONE SYSTEM

CUSTOMER PAGES:

/services/[slug]	Service page with milestone info
/checkout/project	Milestone project checkout
/projects	List of my projects
/projects/[id]	Project dashboard (main page)
/projects/[id]/milestones/[id]	Single milestone detail
/projects/[id]/milestones/[id]/review	Approve/revise milestone
/projects/[id]/fund/[milestone]	Fund next milestone

```
/projects/[id]/chat
```

Project conversation

PROVIDER PAGES:

```
/provider/projects
```

My assigned projects

```
/provider/projects/[id]
```

Project detail with milestones

```
/provider/milestones/[id]/deliver
```

Submit milestone delivery

```
/provider/milestones/[id]/update
```

Update milestone progress

TENANT ADMIN PAGES:

```
/admin/projects
```

All projects list

```
/admin/projects/[id]
```

Project overview with financials

```
/admin/services/[id]/milestones
```

Configure milestones for service

New Sections/Components

NEW UI COMPONENTS FOR MILESTONES

1. MILESTONE INDICATOR BADGE

MILESTONE PROJECT

This service uses staged payments

Shows on: Service cards, Service detail page

2. MILESTONE BREAKDOWN TABLE

#	Phase	Amount	Duration
1	Discovery	\$1,000	1 week
2	Design	\$2,500	2 weeks
3	Development	\$4,500	4 weeks
4	Launch	\$2,000	1 week

Shows on: Service detail, Checkout, Project dashboard

3. MILESTONE PROGRESS TRACKER



M1
Done

M2
Now

M3
Wait

M4
Wait

Shows on: Project dashboard header

4. MILESTONE CARD

 MILESTONE 2: Design

IN PROGRESS

Amount: \$2,500

Status:  Funded (In Escrow)

Progress:  60%

Deadline: 5 days left

[View Details] [Chat]

Shows on: Project dashboard, Provider dashboard

5. ESCROW STATUS BADGE

 FUNDED (In Escrow)

- Green badge

 Not Funded

- Gray badge

 Released

- Blue badge

 Disputed

- Red badge

Shows on: Milestone cards, Payment sections

6. DELIVERABLES CHECKLIST

Homepage wireframe [✓ Delivered]

Inner page wireframes [✓ Delivered]

High-fidelity designs [In Progress]

Interactive prototype [Pending]

Shows on: Milestone detail, Delivery submission, Review page

7. APPROVAL BUTTONS

Request Revision

Approve & Release

Shows on: Milestone review page

Implementation Priority

IMPLEMENTATION ORDER

PHASE 1: Core Models

- └── 1. Project model
- └── 2. Milestone model
- └── 3. MilestoneDeliverable model
- └── 4. MilestoneDelivery model

PHASE 2: Service Configuration

- └── 5. Add milestone config to Service model
- └── 6. Add milestone setup to Package model
- └── 7. Admin UI for configuring milestones per service

PHASE 3: Customer Flow

- └── 8. Service page with milestone breakdown
- └── 9. Checkout flow for first milestone
- └── 10. Project dashboard page
- └── 11. Milestone detail page
- └── 12. Approval/revision page
- └── 13. Fund next milestone page

PHASE 4: Provider Flow

- └── 14. Provider project list
- └── 15. Provider milestone view
- └── 16. Progress update functionality
- └── 17. Delivery submission form

PHASE 5: Payment Integration

- └── 18. Escrow hold on milestone fund
- └── 19. Release on approval
- └── 20. Refund on dispute/cancel

PHASE 6: Notifications

- └── 21. Milestone funded notification
- └── 22. Delivery submitted notification
- └── 23. Approval/revision notification

└─ 24. Fund next milestone reminder

Summary

Key Takeaways

Term	What It Is	Who Sees It	Where It Appears
Milestone	Stage in large project	Customer, Provider, Admin	Project dashboard, Service page
Escrow	Held payment	Customer, Provider	Milestone cards, Payment section
GMV	Total platform transactions	Super Admin only	Super Admin dashboard

Customer Benefits of Milestones

- Pay as you go** - Only fund one milestone at a time
- Review checkpoints** - Approve before moving forward
- Full control** - Pause or cancel anytime
- Protected payments** - Escrow until satisfied

Provider Benefits of Milestones

- Guaranteed payment** - Funded = guaranteed
- Regular cash flow** - Paid at each milestone
- Clear expectations** - Know exactly what to deliver
- Protection** - Customer can't take back payment unfairly

This document extends the main Platform Guide with detailed milestone, escrow, and GMV information.