

Game Changing Job Management with FYI



Make multi-tasking a breeze with a single workspace for each job

FYI's Job Management is purpose-built for accountants, where you can add comments and tasks to a job, file documents and record time – all without having to leave FYI.

- ✓ **Using FYI for Job Management**
- ✓ **How to transition to FYI for Job Management**
- ✓ **Key benefits of managing jobs with FYI**

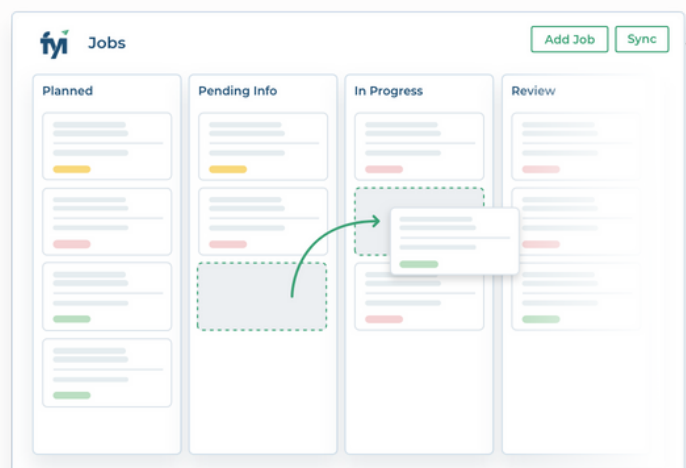
Client	Name	State	Estimated	Actual
Duncan, Carol	2021 Annual Compliance	Review	15:00	11:30
Brown, Charlie	2021 Individual Tax Return	In progress	03:00	01:00
Marshall Family Trust	2021 Annual Compliance	Pending Info	25:00	14:00
Marshall Family Trust	Q2 Management Reports	Not Started	05:00	00:30
Steel, Max	2021 Individual Tax Return	In progress	03:00	01:00
Allport, Kevin Peter	2020 Individual Tax Return	On Hold	05:00	03:00

FYI's Job Management allows you to work from a dedicated workspace for every job and know in an instant where each job stands, across your entire team.

Leverage jobs views to display jobs by Partner or Manager and keep track of time spent versus budget.

The Kanban-style jobs board makes it easy to update jobs and see where bottlenecks may be arising.

Stay on top of your jobs, without leaving FYI.



Manage jobs the easy way



Track all work in a single view 'real time'

Manage your jobs from the board or list view with complete visibility of all job details for the entire team.



Monitor time spent with budget

Keep track of time spent versus budget and monitor job progress for your team.



Track key milestones

Use job states and custom fields for job milestone management and tracking.



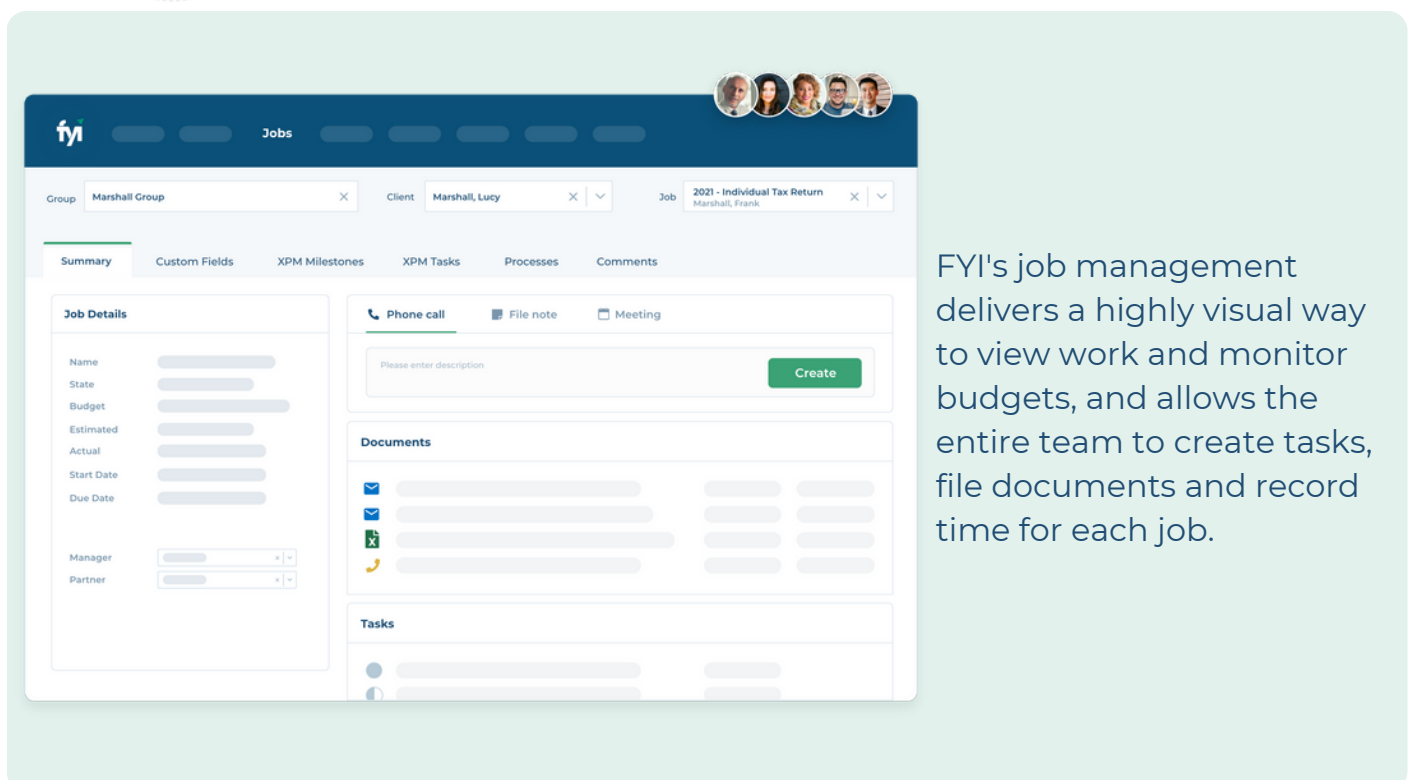
Flexibility to view what you need

Display jobs by category, state, partner, manager or seamlessly switch to the 'kanban' style view, making it super-easy to visualise work and spot any bottlenecks.



Collaborate better to get the work done

Work from a dedicated Job Workspace, with full visibility for the whole team of every email, document and task filed to a job.



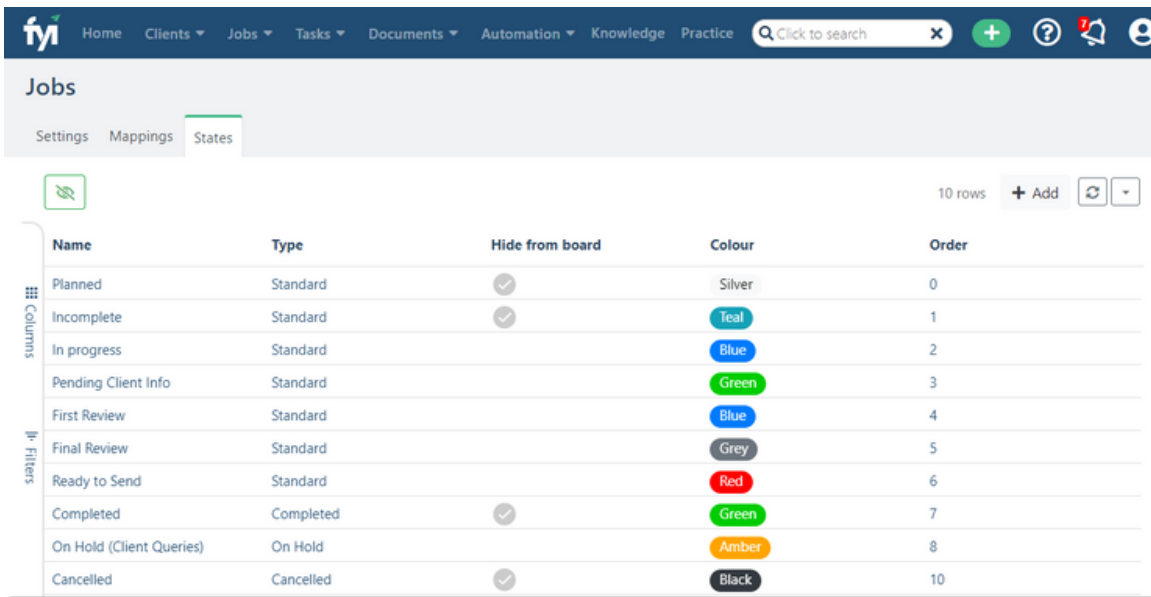
FYI's job management delivers a highly visual way to view work and monitor budgets, and allows the entire team to create tasks, file documents and record time for each job.

How to transition to FYI for job management

Consider the following to help prepare for your transition to FYI to manage your jobs.

Map your Job States

Review your job states, colour code and order them in FYI for quick visibility and management in list and kanban views



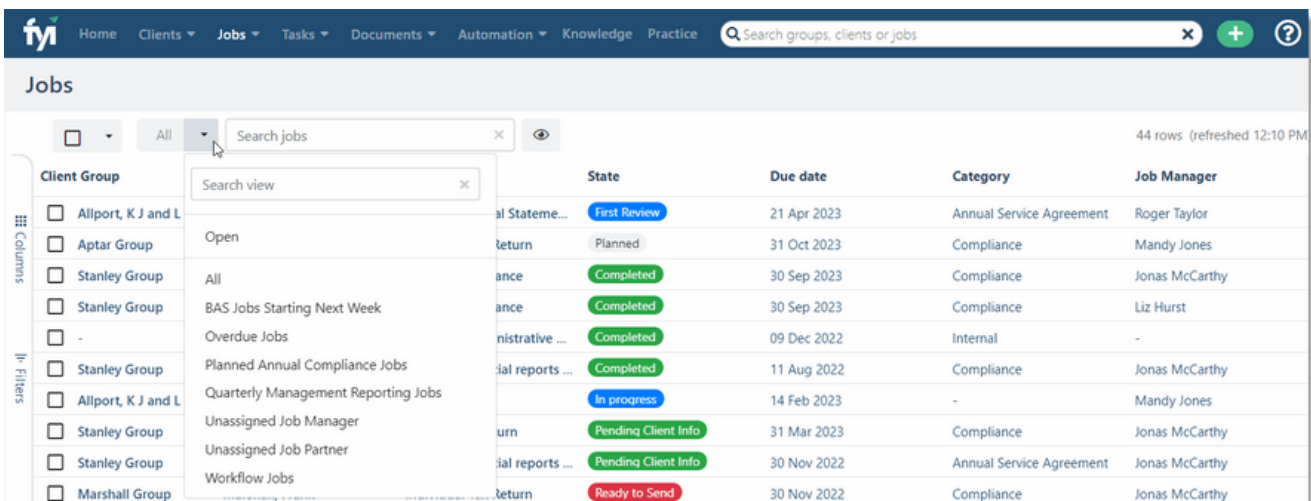
Name	Type	Hide from board	Colour	Order
Planned	Standard	<input checked="" type="checkbox"/>	Silver	0
Incomplete	Standard	<input checked="" type="checkbox"/>	Teal	1
In progress	Standard	<input type="checkbox"/>	Blue	2
Pending Client Info	Standard	<input type="checkbox"/>	Green	3
First Review	Standard	<input type="checkbox"/>	Blue	4
Final Review	Standard	<input type="checkbox"/>	Grey	5
Ready to Send	Standard	<input type="checkbox"/>	Red	6
Completed	Completed	<input checked="" type="checkbox"/>	Green	7
On Hold (Client Queries)	On Hold	<input type="checkbox"/>	Amber	8
Cancelled	Cancelled	<input checked="" type="checkbox"/>	Black	10

Create Custom Fields and Views

Consider what information you need to view quickly for team meetings and to spot bottlenecks.

Popular views typically include grouping by Category, State, Job Manager.

Explore default views such as Overdue Jobs.



Client Group	State	Due date	Category	Job Manager
Allport, K J and L	First Review	21 Apr 2023	Annual Service Agreement	Roger Taylor
Aptar Group	Planned	31 Oct 2023	Compliance	Mandy Jones
Stanley Group	Completed	30 Sep 2023	Compliance	Jonas McCarthy
Stanley Group	Completed	30 Sep 2023	Compliance	Liz Hurst
-	Completed	09 Dec 2022	Internal	-
Stanley Group	Completed	11 Aug 2022	Compliance	Jonas McCarthy
Allport, K J and L	In progress	14 Feb 2023	-	Mandy Jones
Stanley Group	Pending Client Info	31 Mar 2023	Compliance	Jonas McCarthy
Stanley Group	Pending Client Info	30 Nov 2022	Annual Service Agreement	Jonas McCarthy
Marshall Group	Ready to Send	30 Nov 2022	Compliance	Jonas McCarthy

Using FYI versus Excel for Job Management

Track all work in a single view and jump seamlessly from group to client for quick access to job insights across the client group.

More benefits of managing jobs with FYI over a spreadsheet based system

- ✓ **Real time**
Updating job details in FYI means job details are available immediately to the entire team.
- ✓ **Single source of truth**
Jobs are dynamically retrieved where relevant from your practice management software without the need of updating multiple systems.
- ✓ **Collaboration**
Work from a dedicated Job Workspace, providing visibility to the whole team for all emails, documents and tasks related to a job.
- ✓ **Audit trail**
Display changes that have been made to a Job, including who made the change and when the change was made.
- ✓ **Budget v actual monitoring**
Quickly display time spent versus budget and job progress for your team for all jobs in your practice.
- ✓ **Automations**
Utilise the power of automations to streamline job processing and auto-create email communications, workpapers and internal tasks.



FYI's jobs board will completely transform the way we manage our workflow, reports and meetings. It's a real game-changer!

ADAM WILSON,
PARTNER
WILSON ACCOUNTING



Manage jobs the super easy way, and know where every job stands across the entire team. All without leaving FYI.

For more information on Job Management visit the FYI Help Centre at support.fyidocs.com