

Top Tips for Milestone Tracking

Best Practice Guide



Manage your work with maximum efficiency

Use Custom Fields to tailor job management for your practice and manage jobs in real time.



- ✔ Overview of Milestone Tracking
- ✔ Why use it
- ✔ Working with Milestone Tracking
- ✔ Monitoring & Reporting

	State	Estimated	Actual
	Review	15:00	11:30
	In progress	03:00	01:00
	Pending Info	25:00	14:00
	On Hold	05:00	03:00

Overview of Milestone Tracking

FYI allows practices to know where every job stands across the entire team, allowing you to view jobs by partner or manager and more so you can quickly keep track of time spent vs budget, spot bottlenecks and manage jobs real time.

With Job Custom Fields in FYI, job management can truly be tailored to the needs and requirements of each practice allowing practice's to manage work with maximum efficiency.

A common requirement and key element to job management and reporting is the ability to track milestones for jobs, allowing practices to analyse their data further to determine issues in process and true turnaround time for client work.

Why use it?

Milestone tracking allows you to track progress, help teams stay on track and report accurately on a range of KPI's for your practice to truly understand performance.

Client	Client Group	Name	State	Start date	Due date	Variance	Job Partner	Job Manager	Last Co.	Modified on
Stanley Landscaping	Stanley Group	Annual Compliance	In progress	23 May 2024	30 Sep 2024	15:00	Liz Hurst	Roger Taylor		27 Nov 2024 19:29
Marshall, Frank	Marshall Group	Aug 24 Monthly Bookkeeping	Pending Client Info	18 Sep 2024	30 Sep 2024	00:00	Liz Hurst	-		06 Feb 2025 20:19
Stanley Construction Ltd	Stanley Group	Q2 Quarterly Management	Ready to Send	01 Sep 2023	30 Sep 2024	00:00	Liz Hurst	Roger Taylor		27 Nov 2024 19:29
Stanley Homes	Stanley Group	September 2024 Monthly Bookkeeping	In progress	01 Mar 2024	30 Sep 2024	00:00	Liz Hurst	Roger Taylor		27 Nov 2024 19:29
Stanley Landscaping	Stanley Group	September 2024 Monthly Bookkeeping	Pending Client Info	01 Mar 2024	30 Sep 2024	00:00	Liz Hurst	Roger Taylor		26 Sep 2024 21:30
Stanley Renovation Projects	Stanley Group	September BAS/IAS/GST	Fast Review	11 Mar 2024	30 Sep 2024	00:00	Liz Hurst	Mandy Jones		25 Sep 2024 19:57
Nile Construction Family Trust	Nile Group	Tax Planning	Planned	01 Mar 2023	30 Sep 2024	06:00	Liz Hurst	Mandy Jones		27 Nov 2024 19:29
Butler Family Trust	Butler Family Group	Annual Billing Job 2024	In progress	19 Aug 2024	07 Oct 2024	35:00	Roger Taylor	Michael Drummond		27 Nov 2024 19:29
Duncan, Carol Elizabeth	Aptar Group	Individual Tax Return	Planned	01 Jun 2023	31 Oct 2024	01:00	Roger Taylor	Liz Hurst		27 Nov 2024 19:29
K J & L G Allport	Allport Group	Tax & Financials	In progress	01 Jul 2023	01 Nov 2024	35:00	Liz Hurst	Roger Taylor		28 Nov 2024 20:50
Stanley, Mike	Stanley Group	Income Tax Return	Planned	26 Sep 2024	29 Nov 2024	01:30 (-)	Liz Hurst	Roger Taylor		01 Nov 2024 19:46

Working with Milestone Tracking

How to Set up Milestone Tracking

Job Custom Fields in FYI make the ability to do this super easy and what's more, you can automate it using Custom Processes to ensure nothing is missed and data is accurate.

This best practice guide covers how to setup the tracking of dates for activities completed for an annual compliance job to provide an example of the possibilities of Job Custom Fields with FYI.

- 1 Go to **Practice Settings** and select **General**.
- 2 Select the **Custom Fields** tab.

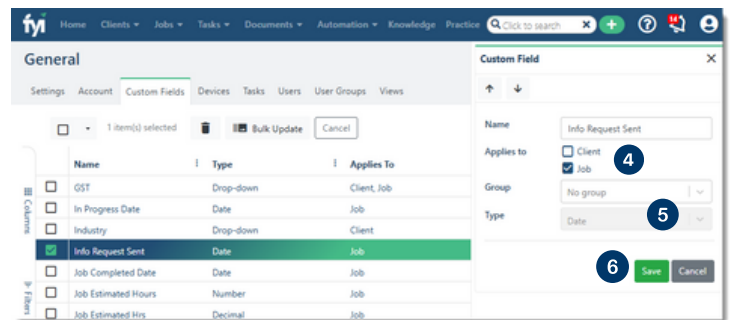
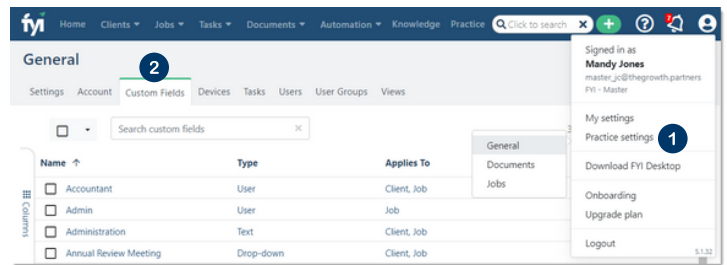
The **key milestones** to track are:

- Info Request Sent
- Work In
- Work Commenced
- Job Reviewed
- Work Complete

Note: you need to be an FYI Admin or have Custom Field permissions to create these fields.

Click **+ Add** to create a new Custom Field.

- 3 Add the **Name** of the new Custom Field
- 4 Select whether it **applies** to Clients or only Jobs.
- 5 Select **Date** as the type of field.
- 6 **Save** the Custom Field to make it available for users to apply to Jobs.



How to Apply Custom Fields to Individual Jobs

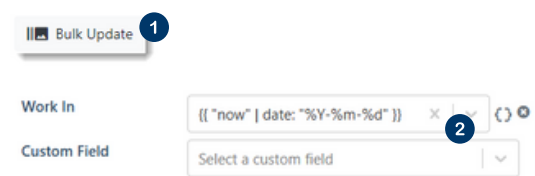
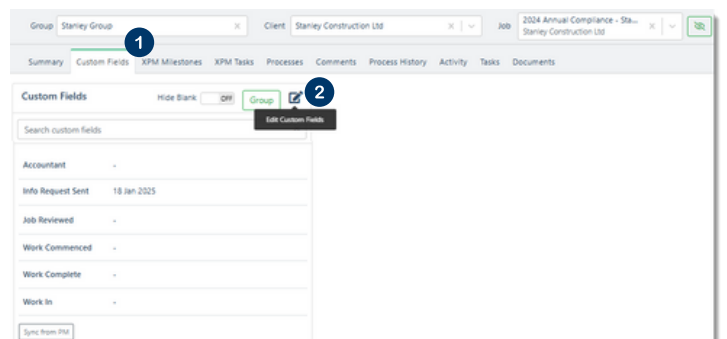
To apply custom field data on individual jobs:

- 1 Go to the Jobs workspace for the specific job and select the **Custom Fields** tab.
- 2 Click the **Edit Custom Fields** icon and populate the dates and save your changes.

How to Apply Custom Fields to Multiple Jobs

To apply custom field data to multiple jobs at a time:

- 1 Select the relevant jobs in the Jobs list and click **Bulk Update**.
- 2 In the Bulk Update drawer, select the relevant fields in **Custom Field** and apply the dates. Note: you can use Merge Fields to select relevant values.

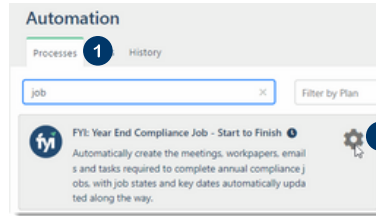


Working with Milestone Tracking

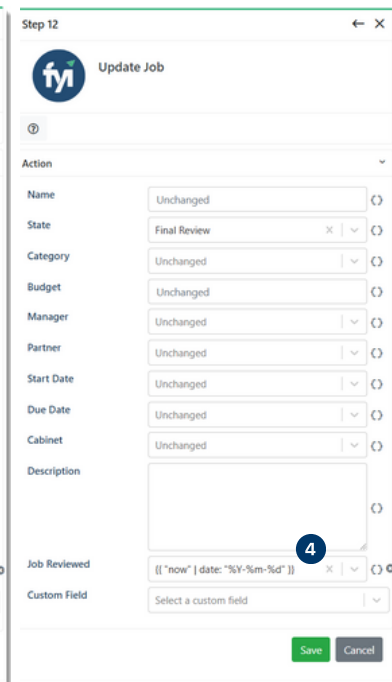
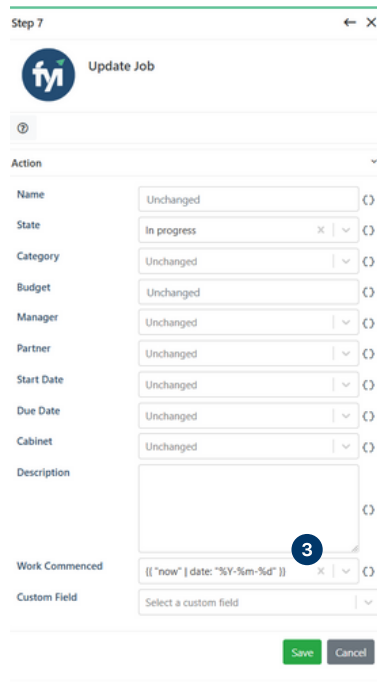
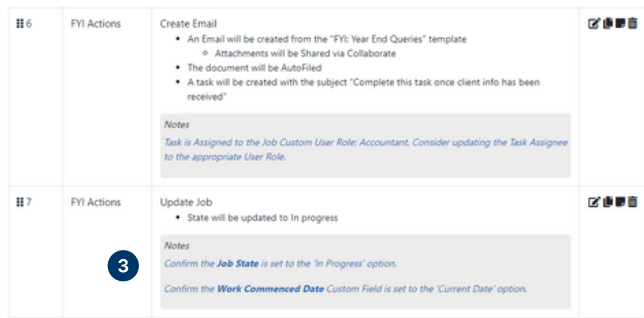
How to Apply Custom Fields using Automations

Tip! Use custom processes to automatically populate the Custom Fields based on certain criteria being met, such as a Task is completed or an Email is sent.

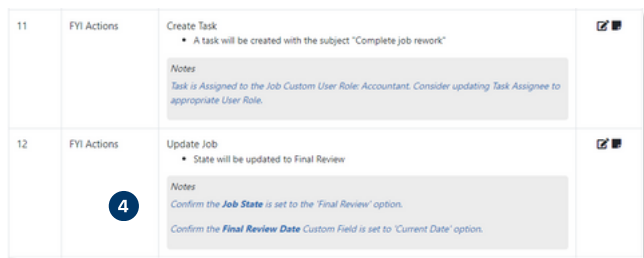
- 1 Go to **Automations - Processes**.
- 2 Locate and **Edit** the Custom Process.



3 Example 1 - Work Commenced Date custom field automatically updates after email is sent



4 Example 2 - Job Reviewed custom field automatically updates after Complete job review task is complete

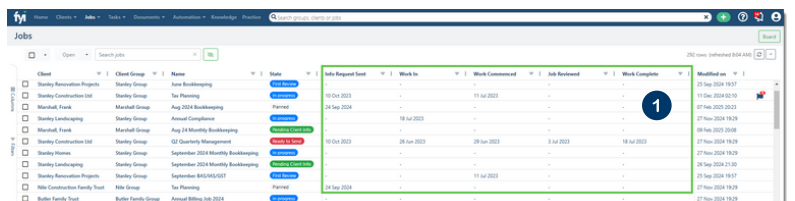


Refer to the [Year End Compliance Job in the Automation Library](#)

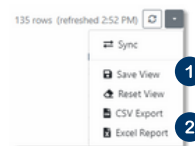
Refer to the [Advanced Automations for Jobs Webinar](#) to get started.

Monitoring & Reporting

- 1 Once these fields are set up, they're ready for use on all jobs and can be used in Jobs lists and custom views.
- 2 Export the list to excel for further reporting or filtering as required, for instance to do a turnaround calculation on 'work in' to 'work complete'.



You can also segment this to partners and managers to spot bottlenecks or process issues across teams.



Customise job management and track milestones with ease.

For more information on Custom Fields, visit the FYI Help Centre at support.fyi.app