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



Overview of Milestone Tracking

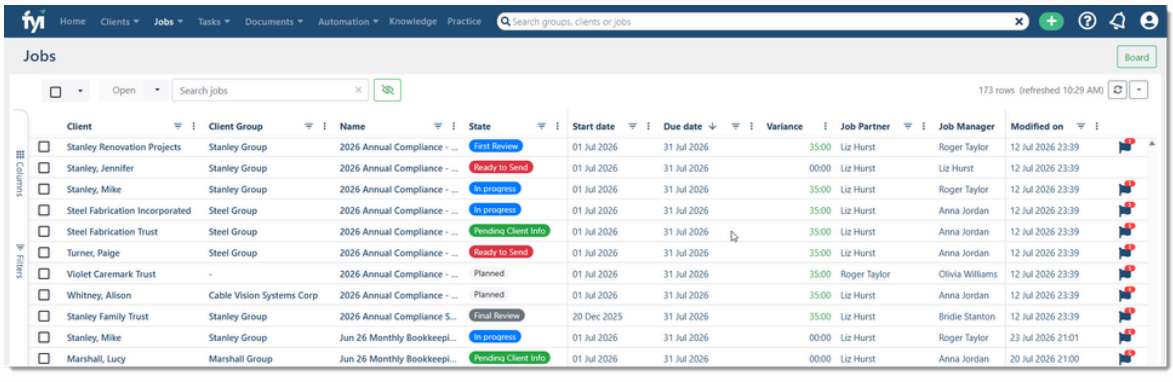
FYI allows practices to know where every job stands across the entire team, allowing you to view jobs by partner or manager and more so you can quickly keep track of time spent vs budget, spot bottlenecks and manage jobs real time.

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.



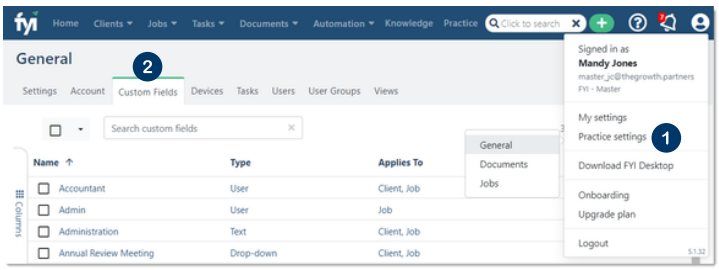
Working with Milestone Tracking

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.

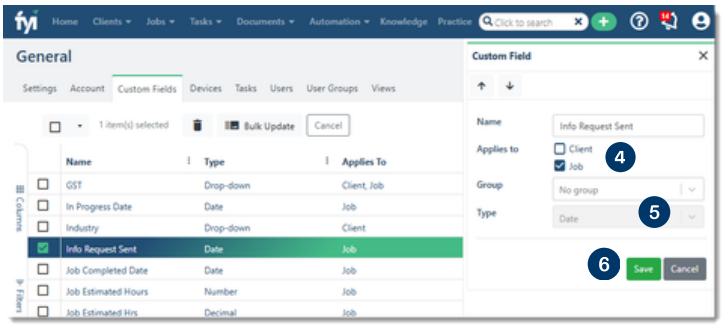


The **key milestones** to track are:

- 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.

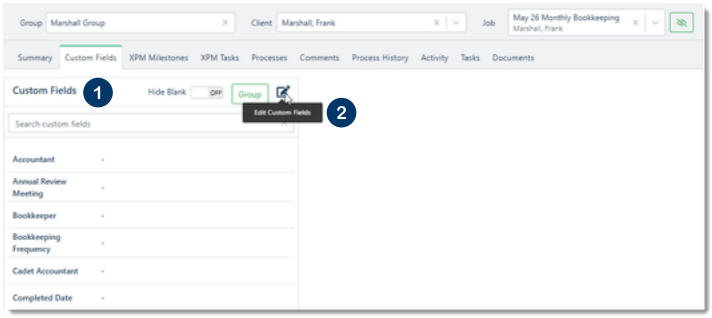


3. Add the **Name** of the new Custom Field
4. Select whether it **applies** to Clients or only Jobs.
5. Select **Date** as the type of field.
6. **Save** the Custom Field to make it available for users to apply to Jobs.

How to Apply Custom Fields to Individual Jobs

To apply custom field data on individual jobs:

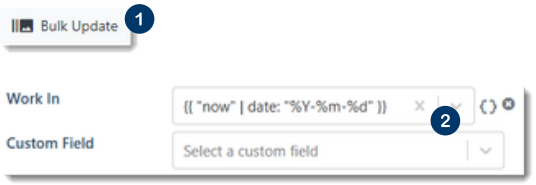
1. Go to the Jobs workspace for the specific job and select the **Custom Fields** tab.
2. Click the **Edit Custom Fields** icon and populate the dates and save your changes.



How to Apply Custom Fields to Multiple Jobs

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

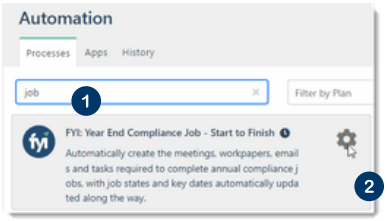
1. Select the relevant jobs in the Jobs list and click **Bulk Update**.
2. In the Bulk Update drawer, select the relevant fields in **Custom Field** and apply the dates. Note: you can use Merge Fields to select relevant values.



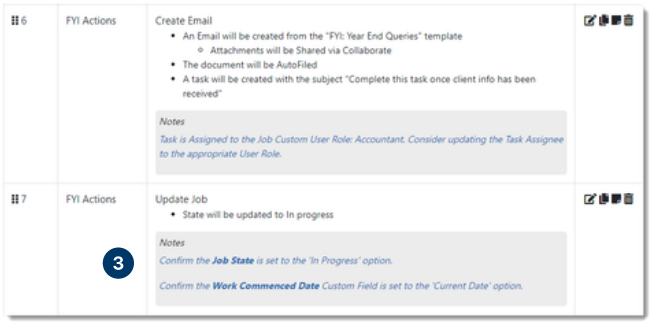
Working with Milestone Tracking

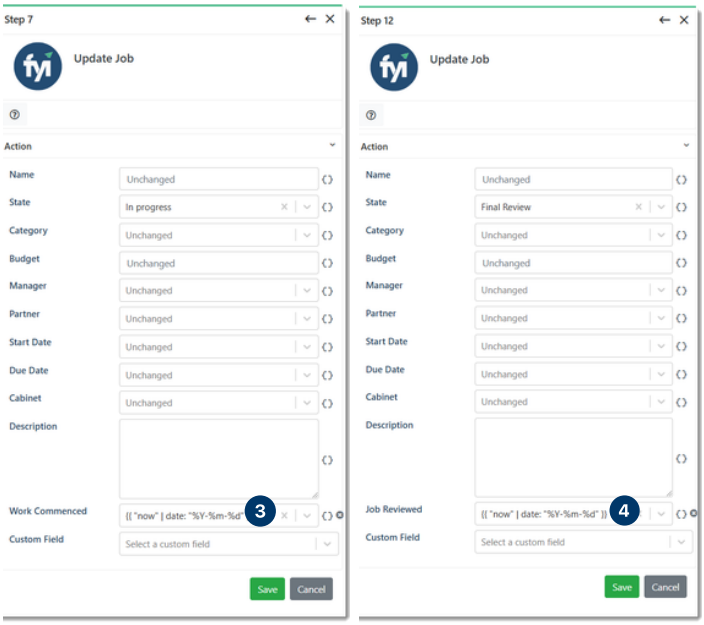
How to Apply Custom Fields using Automations

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.

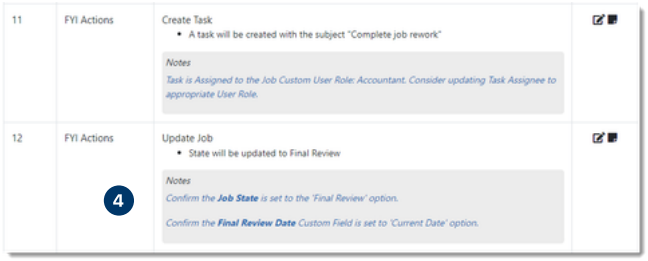


1. Go to **Automations - Processes**.
2. Locate and **Edit** the Custom Process.
3. **Example 1 - Work Commenced Date custom field automatically updates after email is sent**





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



The Automation Library is available in Guide.

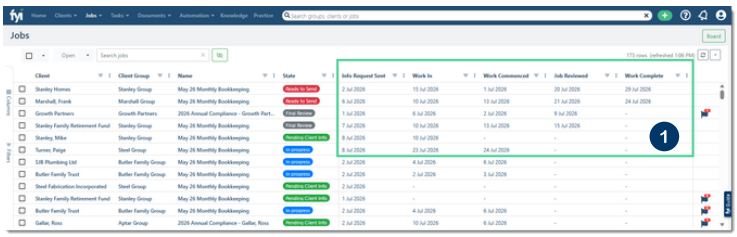
Refer to the Year End Compliance Job article for more information.

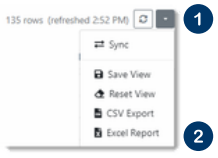
Refer to the Advanced Automations for Jobs Webinar to get started.

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