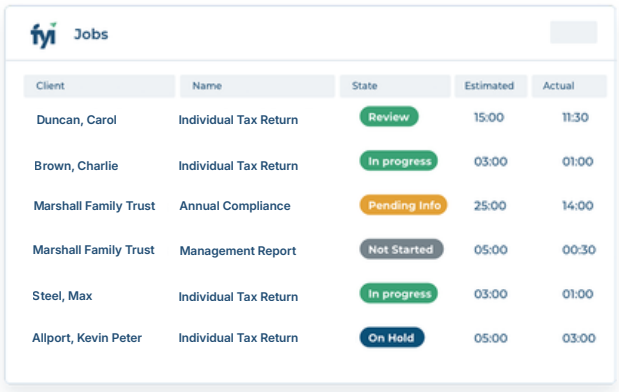
Game Changing Job Management
With FYI

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**

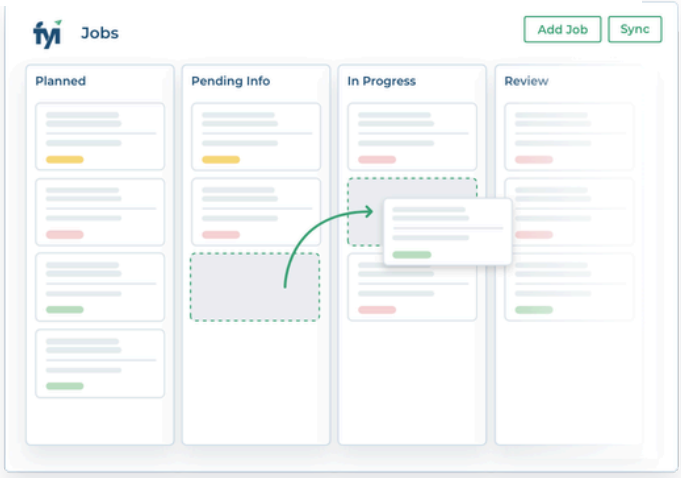


FYI's Job Management allows you to work from a dedicated workspace for every job and know in an instant where each job stands, across your entire team.

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

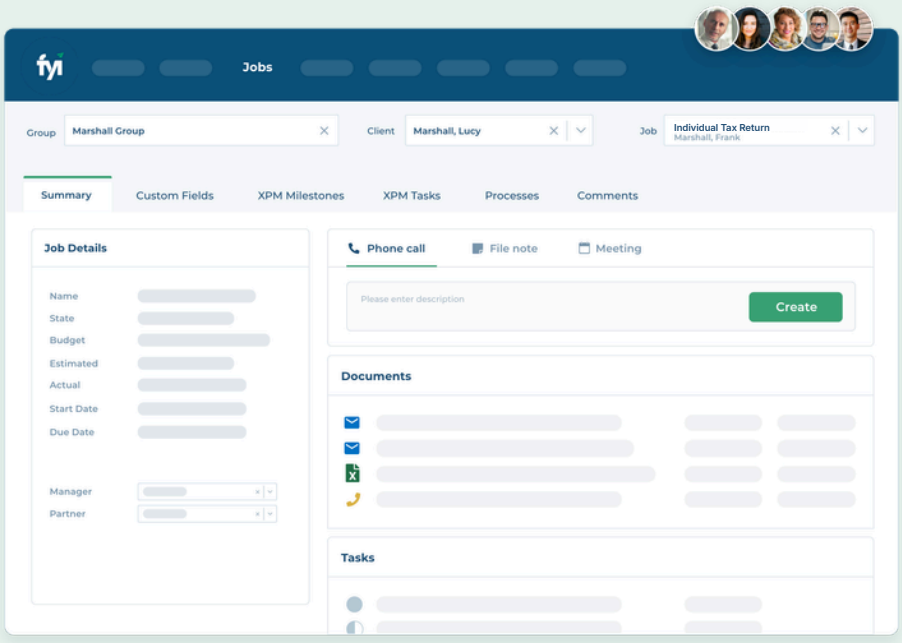
Use job states and custom fields for job milestone management and tracking.

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.



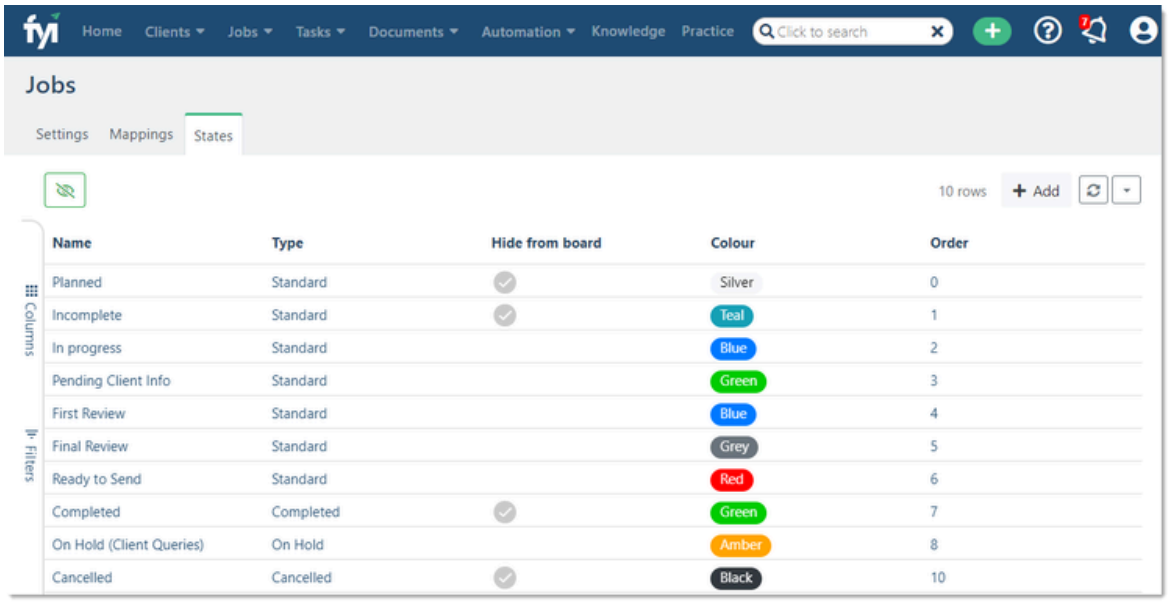
FYI's job management delivers a highly visual way to view work and monitor budgets, and allows the entire team to create tasks, file documents and record time for each job.

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



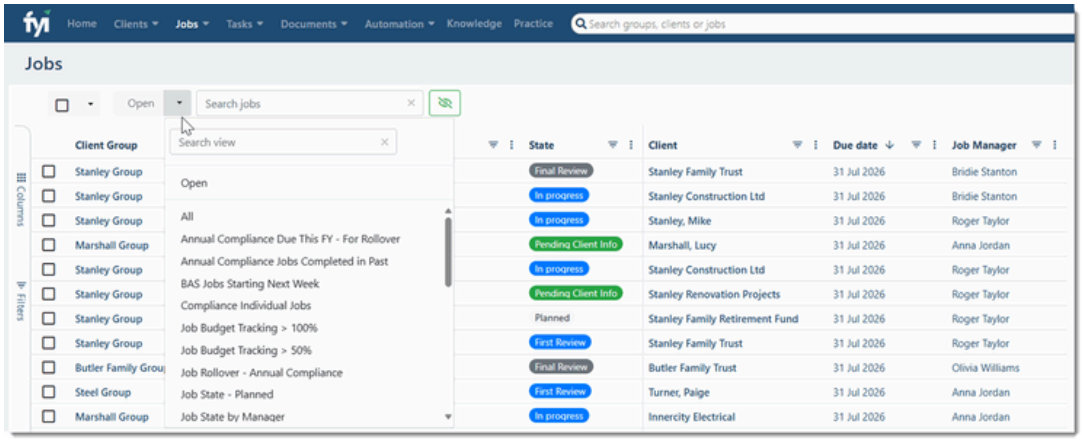
Name	Type	Hide from board	Colour	Order
Planned	Standard	✓	Silver	0
Incomplete	Standard	✓	Teal	1
In progress	Standard		Blue	2
Pending Client Info	Standard		Green	3
First Review	Standard		Blue	4
Final Review	Standard		Grey	5
Ready to Send	Standard		Red	6
Completed	Completed	✓	Green	7
On Hold (Client Queries)	On Hold		Amber	8
Cancelled	Cancelled	✓	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.



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 changed 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.fyi.app