

Job Types in FYI

Info Guide



Elite Plan

Standard Jobs and Billing and Workflow Jobs for your practice

Set up Jobs to easily track and monitor job progress for your team, from within FYI.

- ✓ Overview of Standard, Billing and Workflow Jobs
- ✓ When to use Standard Jobs or Billing and Workflow Jobs in your Practice
- ✓ How to manage Workflow Jobs

	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

What is a Standard Job?

Standard jobs are used to **record time** and to **manage work** being completed for clients. For example, an Individual Tax job is used to monitor how the work is progressing and is also used to record time for billing purposes.

For a larger client such as a companies or trusts, you might deploy a job per work item. In this case the client would have a job for Year End Work and for a Quarterly Return, both jobs are used to record time for the relevant activities and to also monitor progress of work.

Typically, this approach is taken where invoicing occurs for each item of work, rather than fixed fee i.e. an invoice is issued for Year End and a separate invoice is issued for Quarterly Return.

This icon denotes the Job Type as a Standard Job in the Job Lists and in the Job - Summary tab

Client	Name	Job Number	State	Start date	Due date	Budget	Actual
<input type="checkbox"/> Stanley Renovation Projects	June Bookkeeping	J000047	In progress	01 Jul 2023	12 Jul 2023	1,200.00	00:00
<input type="checkbox"/> Stanley Renovation Projects	June BAS/IAS/GST	J000048	In progress	01 Jul 2023	21 Jul 2023	660.00	00:00
<input type="checkbox"/> Stanley Renovation Projects	Tax & Financials	J000049	Planned	01 Jul 2023	01 Dec 2023	1,600.00	00:00

What is a Billing Job?

The Billing Job is the 'main' job and is used to roll up budget hours, budget amount and WIP from 'sub-jobs' to efficiently invoice clients under a fixed fee arrangement which incorporates different projects.

- 1 Billing Jobs appear in each linked Workflow Job Workspace for you to quickly navigate to, allowing for visibility of rolled up WIP.

Job Type	Name	Client Group	Client	State	WIP	Budget Amount	Actual Amount	Variance Amount	Due date
	Annual Compliance	Allport, K J and L G	Allport, K J and L G	In Progress	1,226.67	930.00	1,226.67	-296.67	20 Apr 2

What is a Workflow Job?

These are 'sub-jobs' to Billing Jobs. Workflow Jobs are recommended for practices when work is not being invoiced separately, i.e. on a per job basis, and your preference is to have the time rolled up to a 'main' job (Billing Job) for fixed fee billing or WIP reporting purposes. Using Workflow Jobs allows visibility into the items of work that must be completed with their respective WIP, whilst maintaining ease of invoicing from a single Billing Job.

- 2 Workflow Jobs appear in the Billing Job Workspace for you to manage and assign to your team.

For example, for an Annual Billing Job, you might have 'sub-jobs' for Year End Financials, BAS/IAS/GST, and Bookkeeping. These are your Workflow Jobs.

Job Type	Name	Client Group	Client	State	Budget Amount	WIP	Actual Amount	Variance Amount	Due date
	Individual tax return	Allport, K J and L G	Allport, K J and L G	Planned	180.00	586.67	586.67	-406.67	20 Apr 2022
	Quarterly BAS - Dec...	Allport, K J and L G	Allport, K J and L G	Completed	250.00	640.00	640.00	-390.00	28 Feb 2022
	Quarterly BAS - June	Allport, K J and L G	Allport, K J and L G	In Progress	250.00	0.00	0.00	250.00	20 Apr 2022
	Quarterly BAS - March	Allport, K J and L G	Allport, K J and L G	Completed	250.00	0.00	0.00	250.00	20 Apr 2022

FYI provides flexibility to dictate when you use Standard Jobs or Billing and Workflow Jobs for any given project for your clients. This allows you to use all Job Types seamlessly when creating Jobs in FYI.

The choice of Job Type is largely dictated on how you will choose to invoice the job itself, whether it is a stand alone item of work you will invoice for, or if you wish to bill on a recurring basis for multiple items of work.

- 3 For management of work, use each Workflow Job. Navigate to workspace for the Workflow Job to review and update job details.

- 4 For management of work in progress, invoicing and job completion, use the Billing Job.

This job is complete when all workflow jobs are completed, and final invoice is raised.

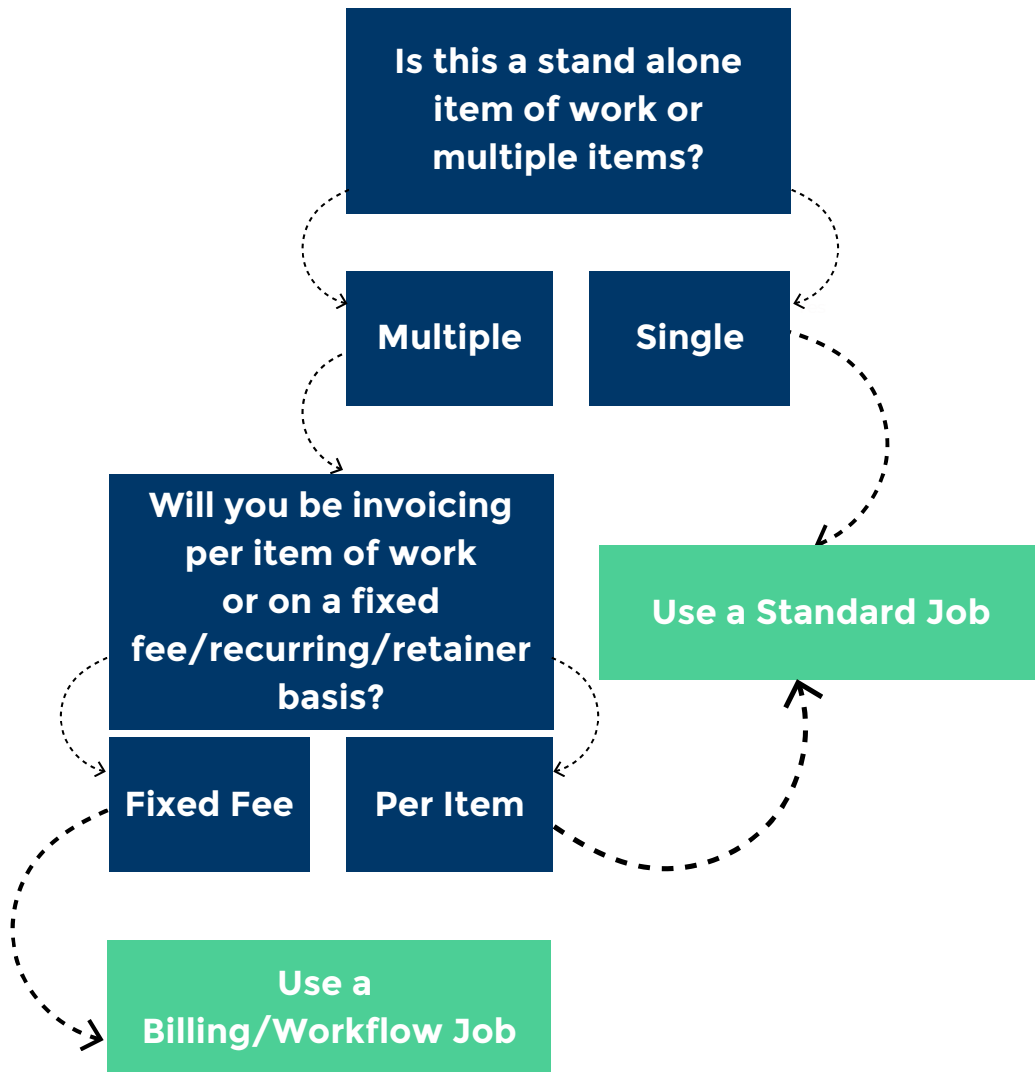
Job Details	
Name	Quarterly BAS - June
State	In Progress
Number	202106169
Type	Workflow

Job Details	
Name	Annual Compliance
State	In Progress
Number	J007317
Type	Billing

When to use Standard or Billing Job?


Key Questions

The flowchart below represents some very high level questions to assist in your practice's decision of when to use each Job Type.




Identifying Job types in FYI


1 Billing Job Type

Summary		Custom Fields	Processes
Job Details  1			
Name	Annual Compliance		
State	In Progress		

2 Workflow Job Type

Summary		Custom Fields	Processes
Job Details  2			
Name	Quarterly BAS - June		
State	In Progress		

3 Standard Job Type

Summary		Custom Fields	Processes
Job Details  3			
Name	Individual tax return		
State	Planned		

How to manage Standard Jobs with FYI

To track progress of jobs we recommend filtering on Job Type of Standard and Workflow - this allows you to ensure work that is required by clients is completed.

Billing and Standard Jobs can also be filtered using the Job Type to manage invoicing requirements for your clients.

When all work has been completed for a Standard Job the final invoice should be raised and the job state updated to Completed.

Client	Name	Job Number	State	Job Type
<input type="checkbox"/> Mills Grills & BBQs	Annual Accounting - 2024	001125	In Progress	[Icon]
<input type="checkbox"/> Mel Keith	Annual Accounting - 2024	001032	In Progress	[Icon]
<input type="checkbox"/> Bobby Brown Limited	Annual Accounting - 2024	001127	In Progress	[Icon]
<input type="checkbox"/> Bobby Brown Limited	Advisory Work - 2024	001128	In Progress	[Icon]
<input type="checkbox"/> Mr Plow Limited	Annual Accounting - 2024	001152	In Progress	[Icon]
<input type="checkbox"/> Amy Evans	Annual Compliance 2024	J008817	In Progress	[Icon]
<input type="checkbox"/> Charlie Brown	Annual Compliance 2024	J008822	In Progress	[Icon]
<input type="checkbox"/> Andrea Martin	Annual Compliance 2024	J011497	In Progress	[Icon]

1 Standard Job Created

Create the Standard Job in FYI and populate key job details and custom fields.

For more refer to [Creating Jobs from Job Templates](#).

Create Job

Client: Duncan, Carol Elizabeth
carol.duncan0011@outlook.com

Job Type: Standard

Template: Annual Compliance - Individuals

Name: Individual tax return

State: Planned

Cabinet: No cabinet selected

Category: Compliance

Primary: -

2 Standard Job Completed

The Standard Job progresses through the Job States independently and is invoiced when required.

To manage WIP, Budget Hours and Budget Amount use the Financial Details section of the Standard Job.

For more refer to [Managing Work in Progress](#).

Once all work is complete, the Final Invoice is raised. The Job State is then set to "Completed" and the job is no longer visible on the Jobs Board or in Open Jobs lists.

Job Details

Name: Individual tax return

State: In Progress

Number: Planned

Type: In Progress

Template: Pending Client Info

Category: At Review

Cabinet: First Review

Start Date: Second review

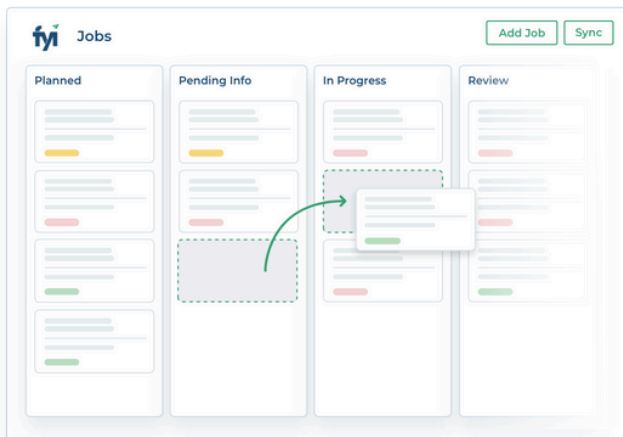
Due Date: 07/06/2024

Manager: Patrick Smith

Partner: Liz Hurst

Financial Details

WIP	0.00
Budget Amount	180.00
Actual Amount	140.00
Write On/Off	-90.00
Budget Hours	1
Actual Hours	00:35
Time Rate	-
Description	Individual tax return preparation including filing.



How to manage Billing & Workflow Jobs with FYI

To track progress of jobs we recommend filtering on Job Type of Workflow and Standard - this allows you to ensure work that is required by clients is completed.

Billing & Standard Jobs can also be filtered using the Job Type to manage invoicing requirements for your clients.

When all Workflow jobs for a Billing job have been completed the final invoice should be raised and the Billing job completed. Similarly for a Standard job.

Client	Name	Job Number	State	Job Type
Mills Grills & BBQs	Annual Accounting - 2024	001125	In Progress	
Mel Keith	Annual Accounting - 2024	001032	In Progress	
Bobby Brown Limited	Annual Accounting - 2024	001127	In Progress	
Bobby Brown Limited	Advisory Work - 2024	001128	In Progress	
Mr Plow Limited	Annual Accounting - 2024	001152	In Progress	
Amy Evans	Annual Compliance 2024	J008817	In Progress	
Charlie Brown	Annual Compliance 2024	J008822	In Progress	
Andrea Martin	Annual Compliance 2024	J011497	In Progress	

1 Billing Job Created

Create the Billing Job in FYI and populate key job details and custom fields.

For more refer to [Creating Jobs from Job Templates](#).

2 Workflow Jobs Created

Create the Workflow Job in FYI, link the Workflow Job to the Billing Job and populate key job details and custom fields.

Note: If there are Workflow Job Templates linked to a Billing Job Template the Workflow Jobs will automatically be created and linked to the Billing Job.

For more refer to [Creating Jobs from Job Templates](#).

3 Workflow Jobs Completed

Each Workflow Job progresses through the Job States independently and is invoiced when required from the Billing Job.

Once all Workflow Jobs are completed, the final invoice is raised.

Job Type	Client	Name	State
	K J & L G Allport	Annual Financial Statements & Tax Return ...	Completed
	K J & L G Allport	BAS Preparation & Lodgement - June	Completed
	K J & L G Allport	Bookkeeping - June Bookkeeping	Completed

4 Billing Job Completed

To manage WIP, Budget Hours and Budget Amount use the Billing Job. The Financial Details displays the total budget hours and budget amount and WIP from each linked Workflow Job, rolled up to the Billing Job. You can also view these details on each Workflow Job.

For more refer to [Managing Work in Progress](#).

Once the Final Invoice has been completed the Job State is set to "Completed" and the job is no longer visible on the Jobs Board or in Open Jobs lists.

Get the most out of Jobs and easily track and monitor your workflow without leaving FYI.

For more information on Jobs in FYI, visit the Help Centre at support.fyi.app