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**

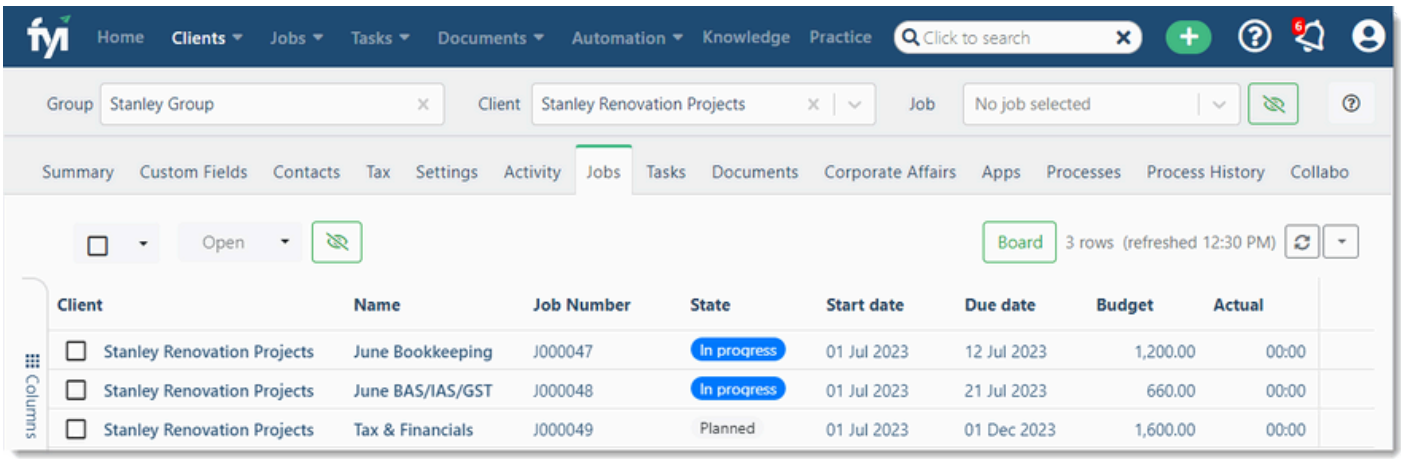
What is a Standard Job?

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.

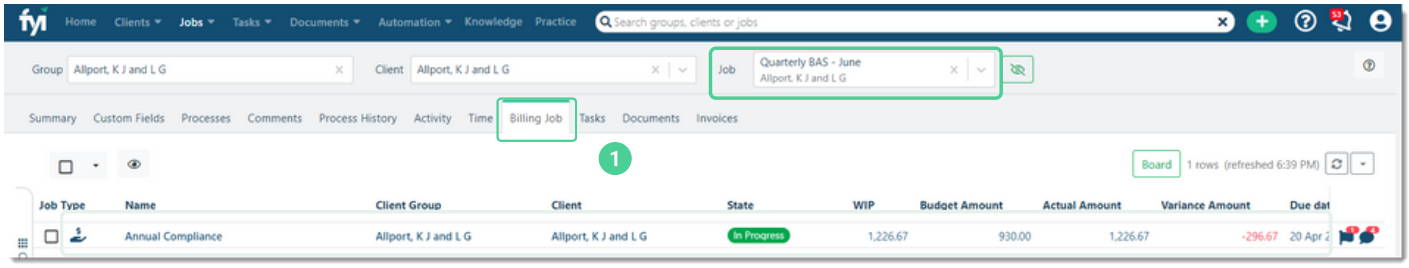
This icon denotes the Job Type as a Standard Job in the Job Lists and in the Job - Summary tab



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 effeciently 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.

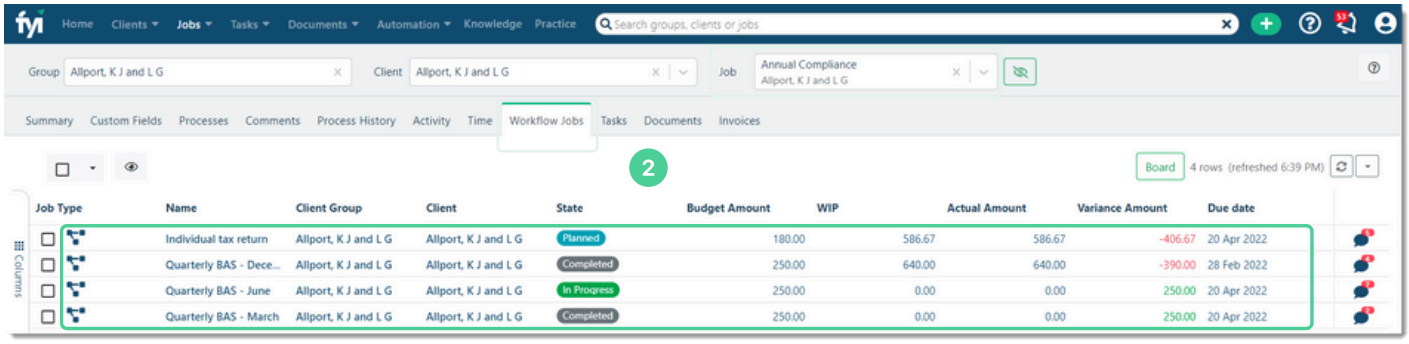


What is a Workflow Job?

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.



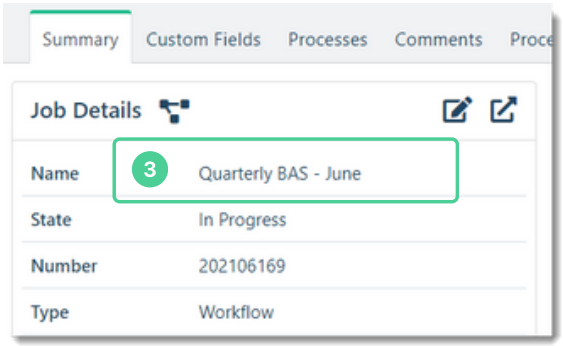
FYI provides flexibility to dictate when you use Standard Jobs or Billing and Workflow Jobs for any given project for your clients. This allows you to use all Job Types seamlessly when creating Jobs in FYI.

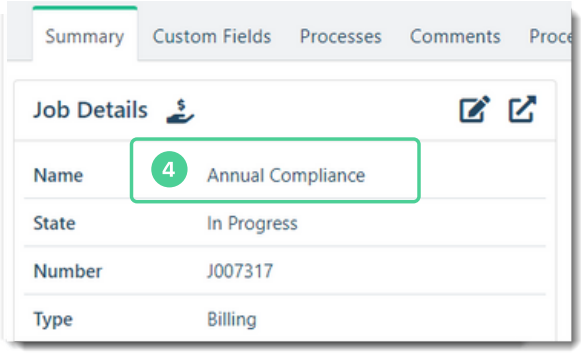
The choice of Job Type is largely dictated on how you will choose to invoice the job itself, whether it is a stand alone item of work you will invoice for, or if you wish to bill on a recurring basis for multiple items of work.

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.

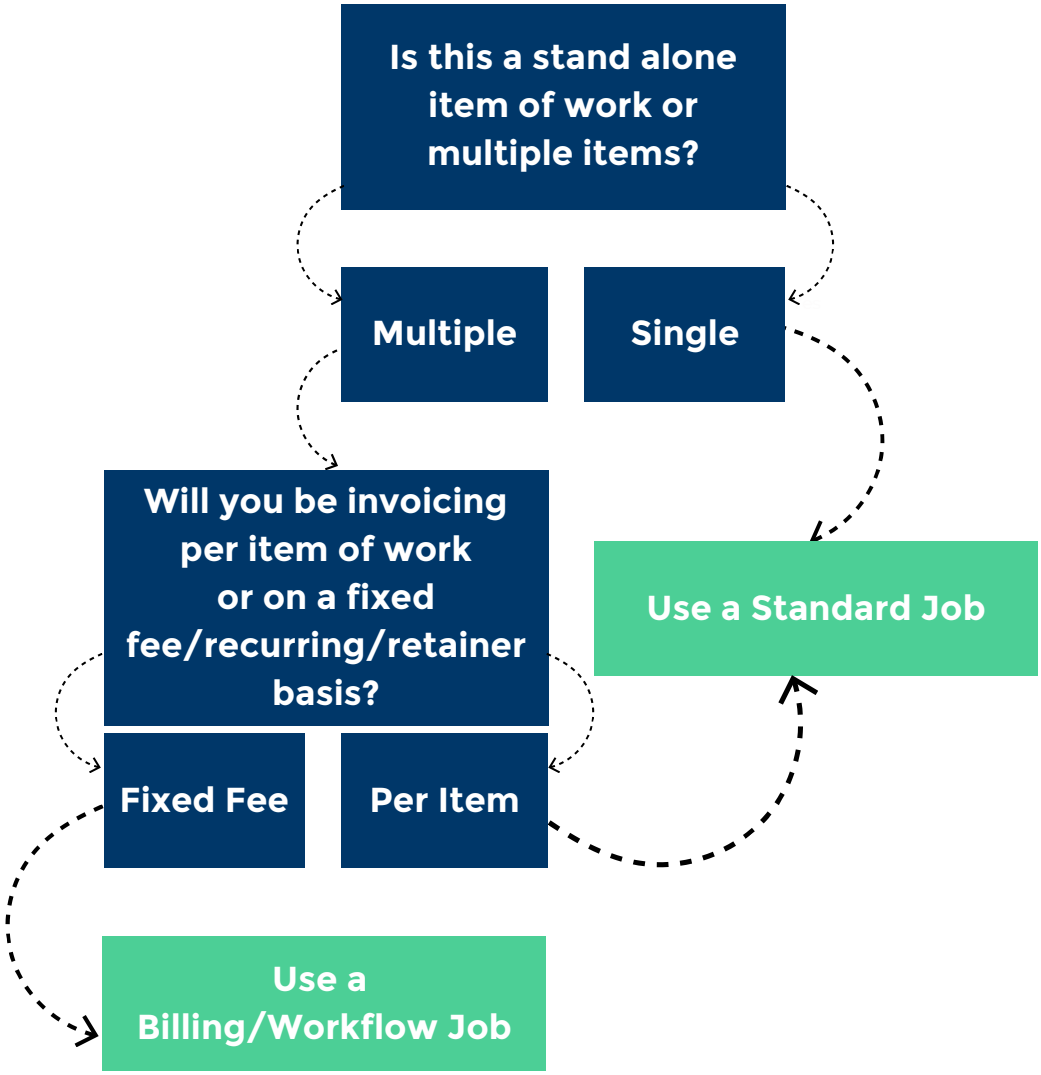




When to use Standard or Billing Job?

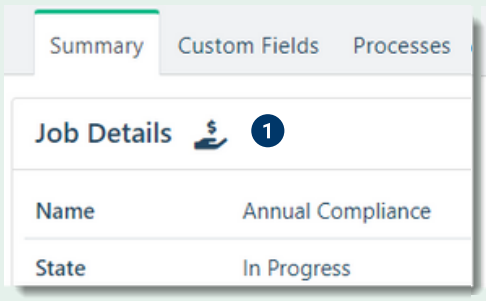
Key Questions

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

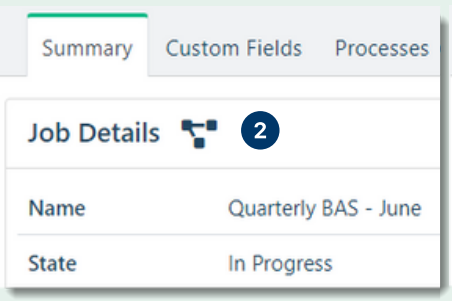


Identifying Job types in FYI

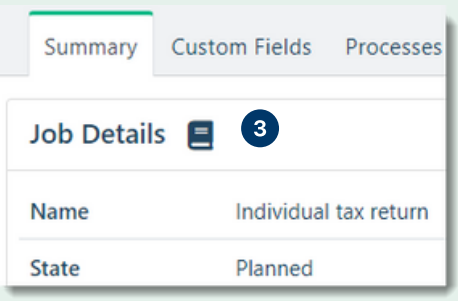
1 Billing Job Type



2 Workflow Job Type



3 Standard Job Type

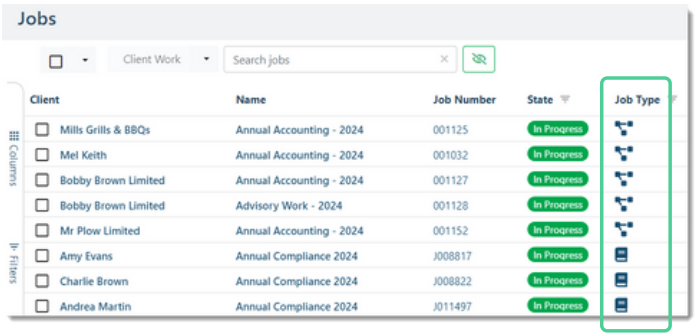


How to manage Standard Jobs with FYI

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.

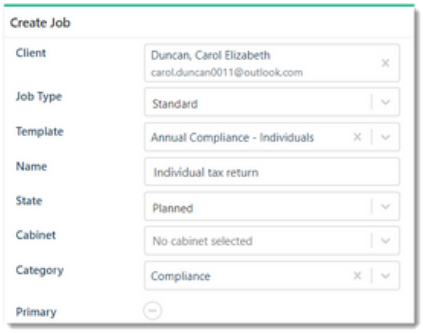
When all work has been completed for a Standard Job the final invoice should be raised and the job state updated to Completed.



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.



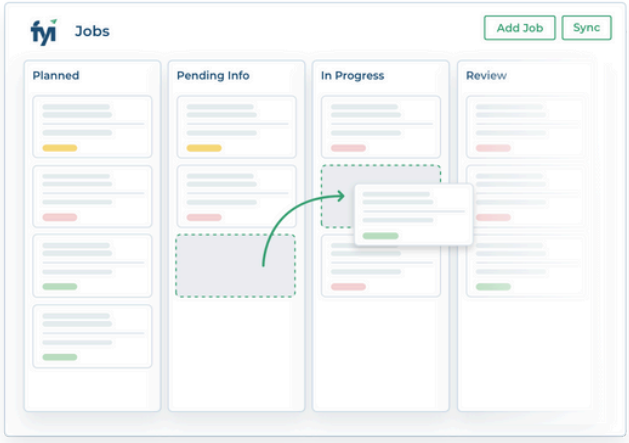
2 Standard Job Completed

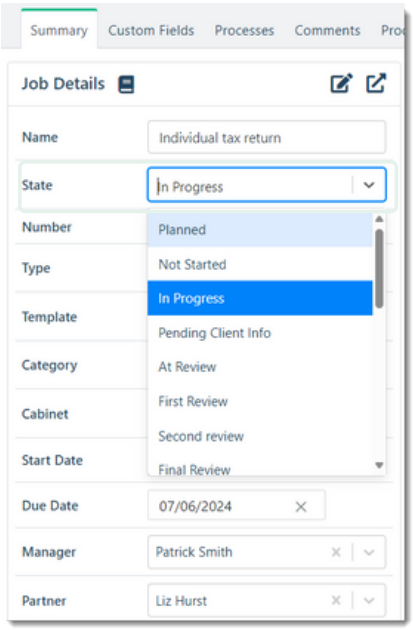
The Standard Job progresses through the Job States independently and is invoiced when required.

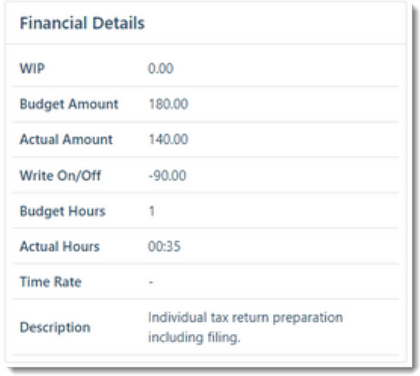
To manage WIP, Buget Hours and Budget Amount use the Financial Details section of the Standard Job.

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.





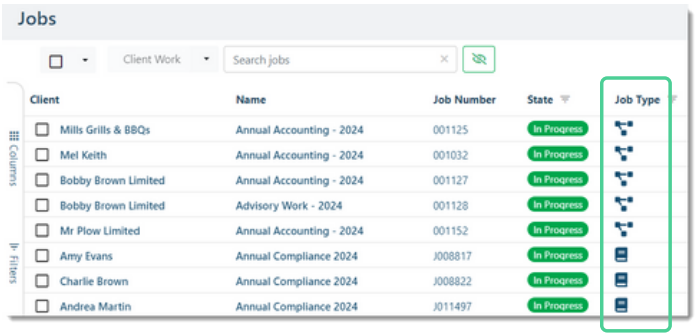


How to manage Billing & Workflow Jobs with FYI

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.

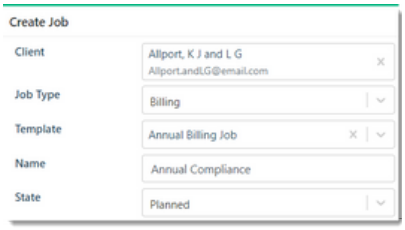
When all Workflow jobs for a Billing job have been completed the final invoice should be raised and the Billing job completed. Similarly for a Standard job.



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.

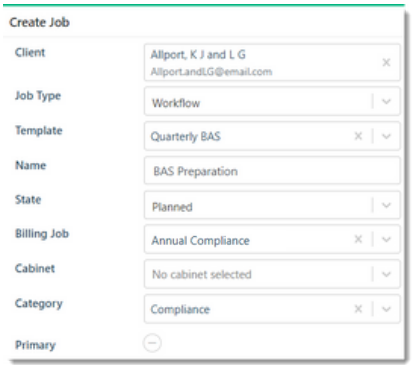


2 Workflow Jobs Created

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.

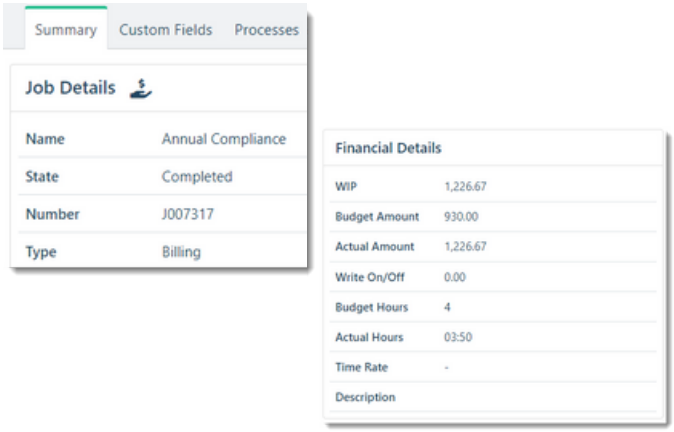
Once all Workflow Jobs are completed, the final invoice is raised.

4 Billing Job Completed

To manage WIP, Buget 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