Job Types in FYI (XPM Workflow)
Info Guide

Pro Plan   Intermediate Plan

Standard Jobs or XPM Workflow Jobs for your practice

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

✅ **Overview of Standard and Workflow Jobs**

✅ **Deciding whether to use 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, a Monthly Bookkeeping 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 timesheet recording is completed on an activity basis and clients are billed on completion of each item of work.

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

What is an XPM Workflow Job?

If you use a single job for clients (typically used where you have retainer clients or clients you bill on regular basis) you will likely have XPM Tasks attached to the job that outlines the Work to be completed for the financial year for the client.

In order to provide visibility and to track those XPM Tasks as items of work to complete for clients, Workflow Jobs are created in FYI.

1 Once enabled, XPM Tasks appear as Workflow Jobs in the Job Workspace for you to manage and assign to your team like a Standard Job.

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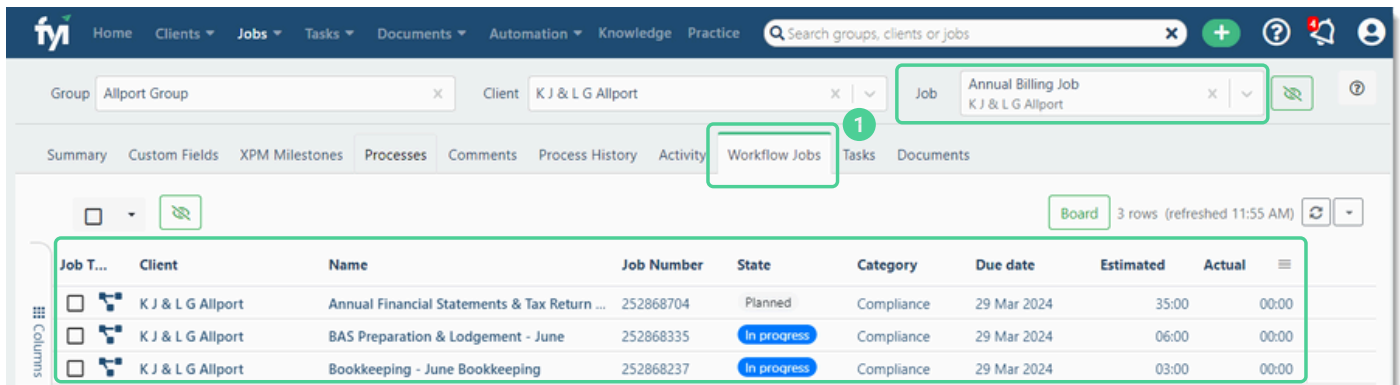

Traditionally you would only see the Annual Job in your Job Workspace, with no visibility or management of the individual tasks that need to be completed as part of the engagement.

By enabling Workflow Jobs, the XPM Tasks would appear in your Job Workspace allowing you to assign and manage the work to completion, ensuring nothing is missed.

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

3 For management of overall progression, use the Billing Job in FYI. This job will be used for Invoicing in XPM.
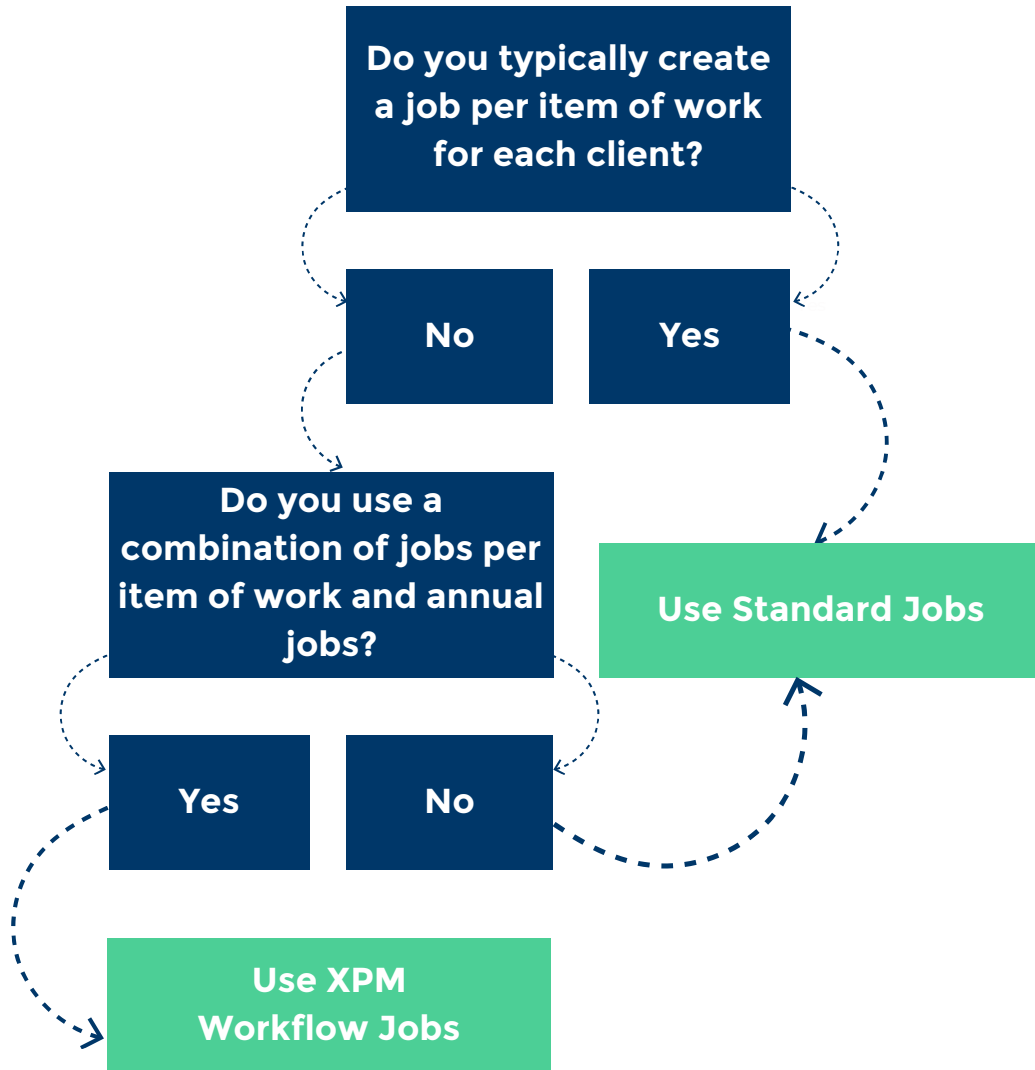This job is complete when all workflow jobs are completed, and final invoice is raised.
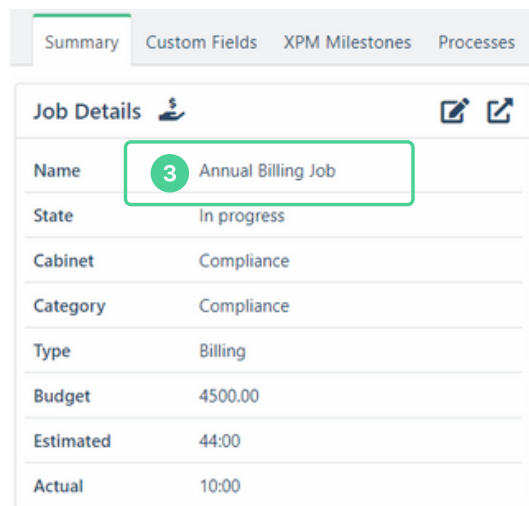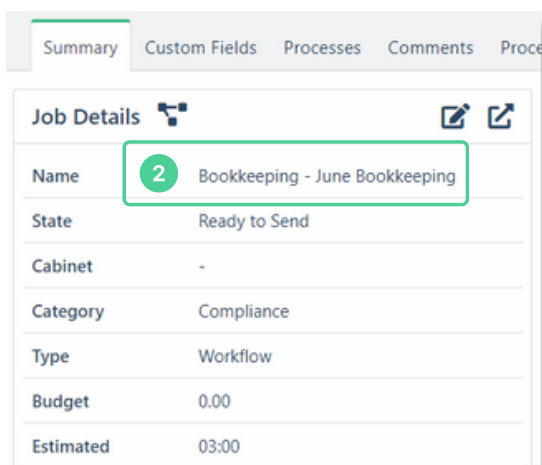
> " FYI's jobs board will completely transform the way we manage our workflow, reports and meetings. It's a real game-changer! "

ADAM WILSON, PARTNER - WILSON ACCOUNTING

Should you use Standard or XPM Workflow Jobs?

Key Questions

The flowchart below represents some very high level questions to assist in your practice's decision of whether to use Workflow Jobs.

Do you typically create a job per item of work for each client?

No

Yes

Do you use a combination of jobs per item of work and annual jobs?

Use Standard Jobs

Yes

No

Use XPM Workflow Jobs

Identifying Job types in FYI

1 Billing Job Type

Summary	Custom Fields	XPM Milestones	Processes

Job Details **1**

Name	Annual Billing Job
State	In progress

Standard Jobs is the default setting initially in FYI.

2 XPM Workflow Job Type

Summary	Custom Fields	Processes	Comments

Job Details **2**

Name	Bookkeeping - June Bookkeeping
State	Ready to Send

Once XPM Workflow Jobs are enabled in Practice Settings, they cannot be disabled.

How to manage Jobs when XPM Workflow jobs are Enabled

To track progress of jobs we recommend filtering on job type of workflow - this allows you to ensure work that is required by clients is completed.

Billing Jobs can also be filtered using the job type to manage invoicing requirements for your clients in XPM. When all workflow jobs for an Annual Job have been completed the final invoice should be raised in XPM and the billing job completed.

Tip: Display the Billing Job column in Job Lists to quickly view which Billing Job the Workflow Job links to.

① Billing Job Created

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

② Workflow Jobs Created

Select a template when creating a Job to pre-populate your Workflow Jobs in FYI. The templates are maintained in XPM.

③ Workflow Jobs Completed

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

Once all Workflow Jobs are completed, and invoicing processed in XPM, the Billing Job can be completed.

④ Billing Job 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