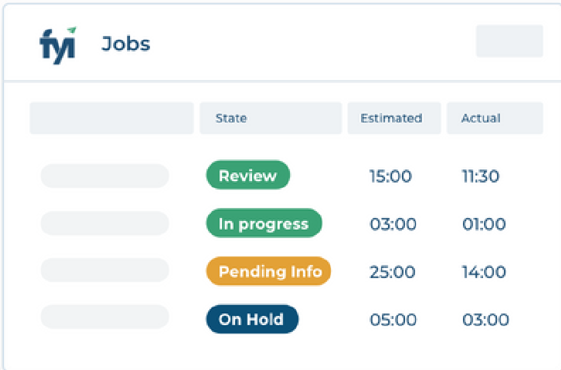
# Jobs
## Best Practice Guide

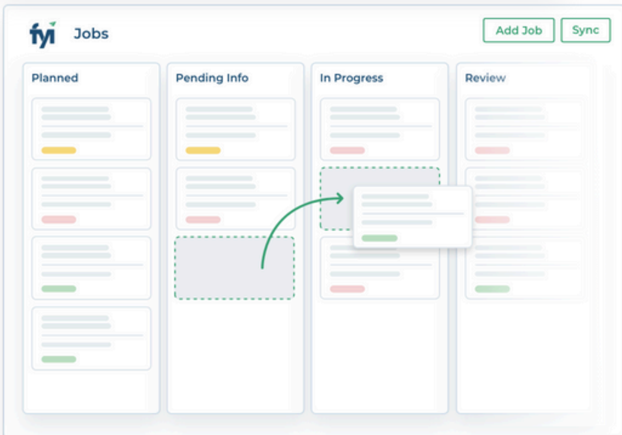
Elite Plan

## Getting the most out of Jobs in FYI

Best practice guide for working with Standard Jobs and Workflow Jobs to track and monitor your workflow in FYI.

- **Getting started with Jobs**
- **Working with Jobs in FYI**
- **Creating Jobs in FYI**
- **Best practice for Standard Jobs and Workflow Jobs**




## Getting Started with Jobs

We recommend all emails and documents to be filed against the relevant job in FYI. This allows you to navigate documents with context.

And from there, pre-populated time entries can be completed with a few clicks.

The Jobs Workspace is designed to capture all relevant information for the specific job including not only documents and time, but also any Tasks and Comments.

Jobs Lists are beneficial to manage your work. Don't forget you can use Custom Views to seamlessly navigate between Jobs Lists for example to view jobs by Job Manager, Job State or Job Category.

To get started:

1. **Review how your jobs display in FYI.** Check which states are visible on the **Jobs Board**.
   **Learn more about Managing Job States**

2. All users are able to update the **Job State**. However, an FYI Admin will need to set up the appropriate permissions for users that need to **create** and **edit jobs**.
   **Learn more about creating and managing user groups**

3. Decide which approach you will adopt in FYI for job tracking and monitoring. This decision may be guided by your time and billing requirements.
   **Learn more about how to use Job Types**

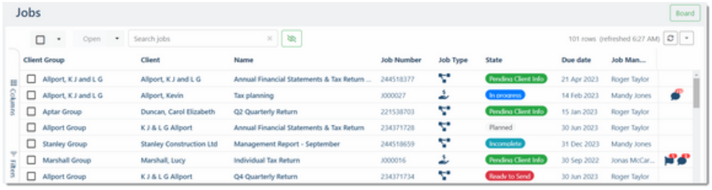
# Working with Jobs in FYI

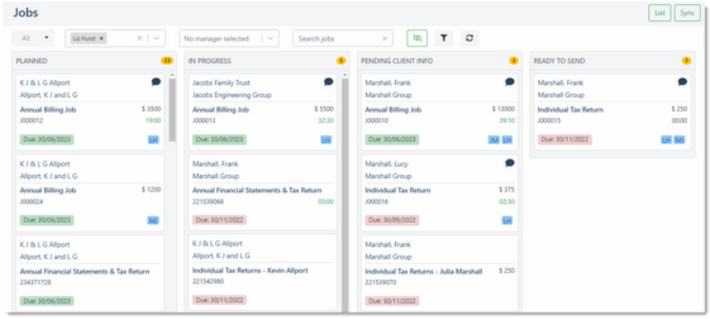
## Jobs workspace

Working from the Jobs List or Jobs Board, your team can select custom views, filter by job partner and/or job manager, and search by job name.

- Jobs List - Add columns containing key details or custom fields; filter the columns; group by columns; filters stick when you jump to the Board view
- Jobs Board - Kanban style used to identify bottlenecks, drag & drop to update job states, get instant visibility on key data.

The list and board views give you instant visibility on how each job is tracking, and saving Custom Views will allow the team to easily switch between job views to display the information they need.




## Keeping jobs up to date

Key Job Details are displayed in the Job - Summary tab along with the Financial Details of the job.

All job information can be edited and maintained in FYI, including financial details and any job custom fields. This can be restricted; users need permission to edit any details other than job state.

Editing job details can be done individually on an as needed basis or in bulk, making the management of jobs a breeze in FYI.

When working with jobs, it is also best practice to save documentation to the job it relates to, this keeps all information relevant to the job within the Job Workspace for easy navigation.

The Financial Details section of a job allows the tracking of job profitability. This can be tracked on an individual job, in the job drawer or job summary tab, or across multiple jobs. By adding the financial detail columns in to the Job List view to track across all jobs within the view.

All submitted time for the job is displayed as 'Actual Hours' and the monetary value of the submitted time is displayed as 'Actual Amount'.

**Job Details**

| | |
|---|---|
| Name | Annual Complaince |
| State | Planned |
| Number | J011360 |
| Type | Standard |
| Template | Annual Compliance - Individuals |
| Category | Compliance |
| Cabinet | Accounting & Finance |
| Start Date | 01/08/2024 |
| Due Date | 01/10/2024 |
| Manager | Nicole Miller |
| Partner | Liz Hurst |
| Assigned | Unknown |

**Financial Details**

| | |
|---|---|
| WIP | 0.00 |
| Budget Amount | 2,700.00 |
| Actual Amount | 3,614.50 |
| Write On/Off | 1,385.51 |
| Budget Hours | 12 |
| Actual Hours | 12:59 |
| Time Rate | 275.00 (Premium) |
| Description | Annual compliance preparation including filing. |

## Making the most of custom fields

Custom fields can be created by an FYI Admin, and edited by those with appropriate permissions.

In FYI, the custom fields have a greater purpose than displaying key job information. You can:

- filter job views for team access
- run automations
- add custom fields as merge fields to emails and documents.

And with the ability to bulk update custom fields, you can quickly add key information to jobs, for example lodgement due dates.

**Custom Fields** Hide Blank ON

Search custom fields

| | |
|---|---|
| Administrator | Amanda Bailey |
| Bookkeeper | Cathy Woods |
| Division | Audit |

# Working with Jobs in FYI

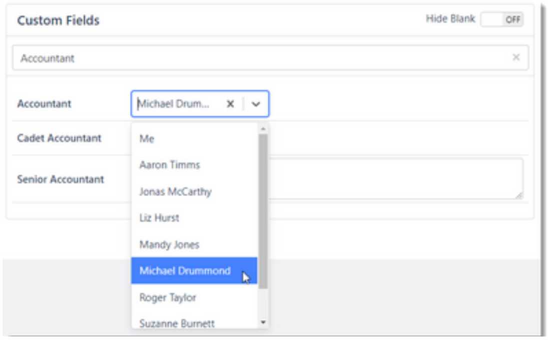
## User roles on jobs

Assign key people to jobs with **User Roles** such as Accountant, Reviewer and Bookkeeper.

This allows you to truly reflect workflow responsibilities within your practice - utilise user roles to manage tasks and workflows in FYI.

Simply assign an active user to the role, select the role in the automation task or workflow and FYI automatically assigns it to the correct user.

User roles can also be used in jobs views, and all updates can be made on individual jobs or in bulk.




# Creating Jobs in FYI

Jobs can be created from within FYI on the fly or from an automation process.

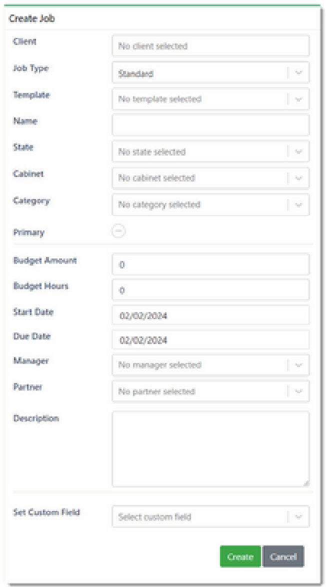
There are different job types available to allow you flexibility for job invoicing and management.

To create jobs in FYI, your job templates will need to be configured as this is a mandatory field when creating jobs. Templates can prepopulate all key job details, including any job custom field information.

**Learn more about job types in FYI**

**Learn more about creating jobs in FYI**

**Learn more about creating jobs as an Automation step**

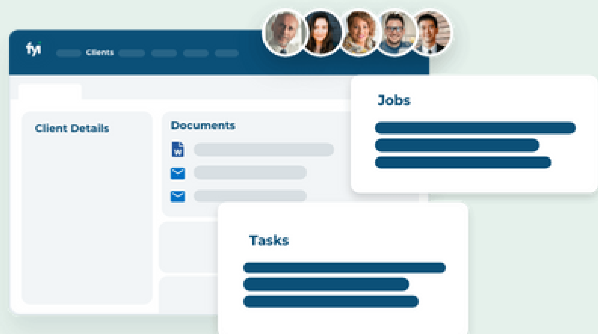


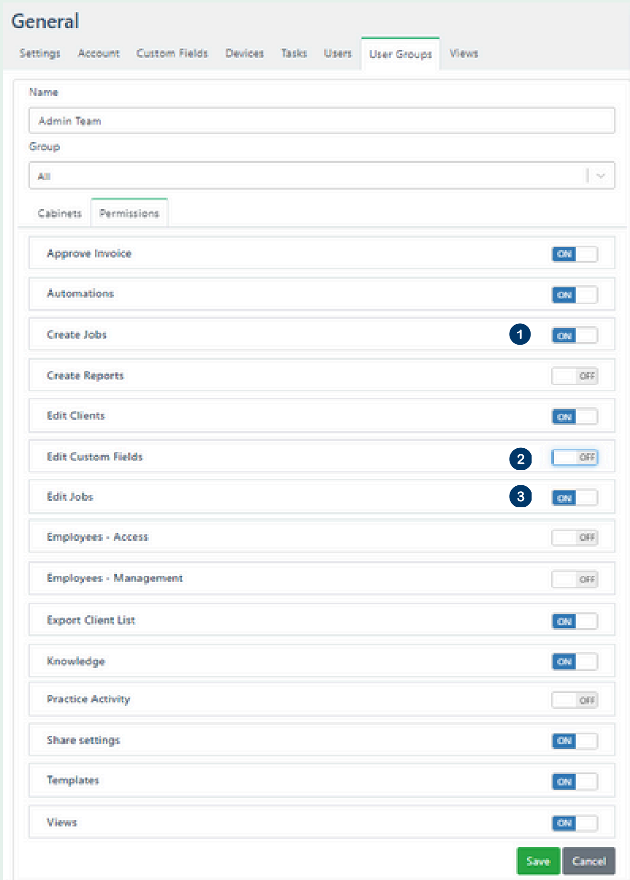

## Permissions for Jobs

Set up permissions in **Practice Admin - General - User Groups**:

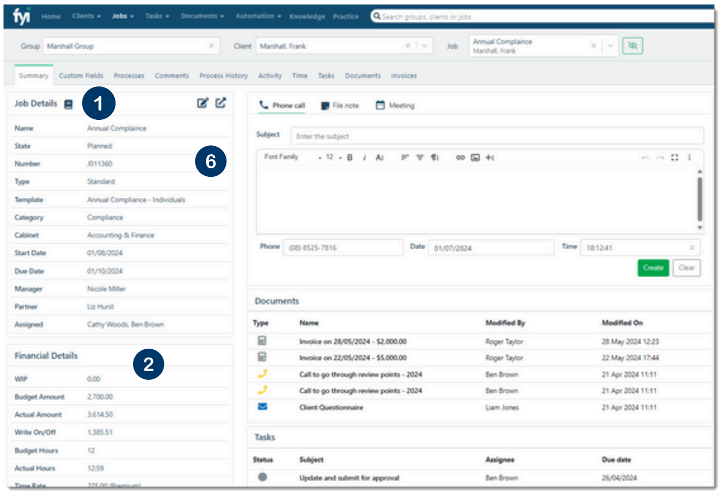
1. **Create Jobs** - create Jobs in FYI
2. **Edit Custom Fields** - allows users to edit custom fields in the Jobs Workspace - Custom Fields tab
3. **Edit Jobs** - edit the key details for the Job including Partner and Manager

**Learn more about managing user groups**



# Best Practice for Standard Jobs



## Overview

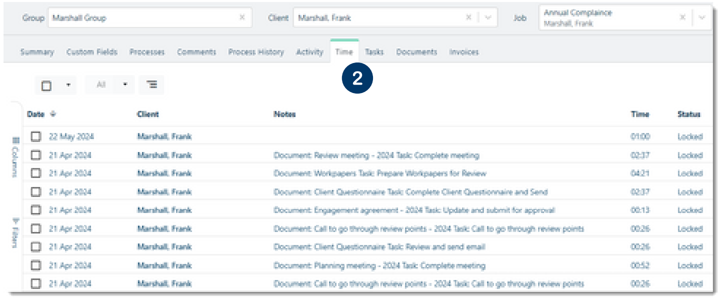
The default job type when creating jobs in FYI is Standard.

Standard Jobs are recommended for practices when:

- Using a job per item of work that is completed for a client (i.e. a standalone job for GST work and another standalone job for Tax work)
- You are not billing on a fixed fee basis.

The job type displays in Job Lists and in the Job - Summary tab as Standard with the following icon:

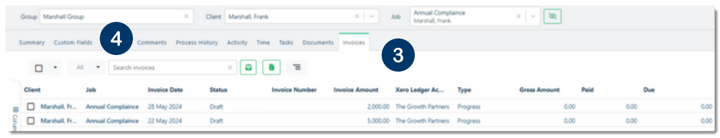
1 **Standard Job**



## What this means in FYI

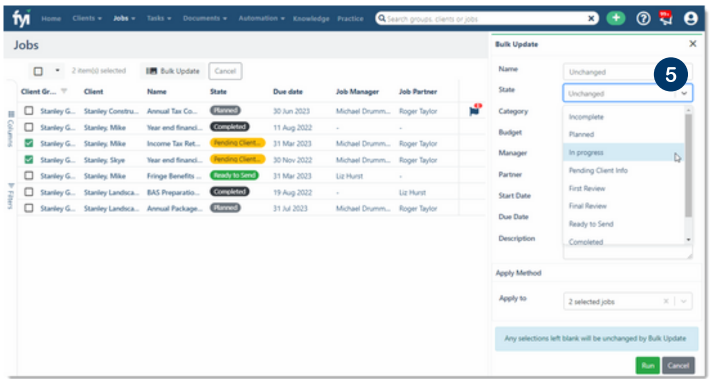
Standard Jobs allow you to track time specific to the job and invoice for that work, complete with WIP management.

2 The time on the job appears summarised in the Financial Details of the job, displaying both hours and value, and in the **Time** tab for individual time entries.



3 Invoices can be located in the **Invoices** tab of the job.

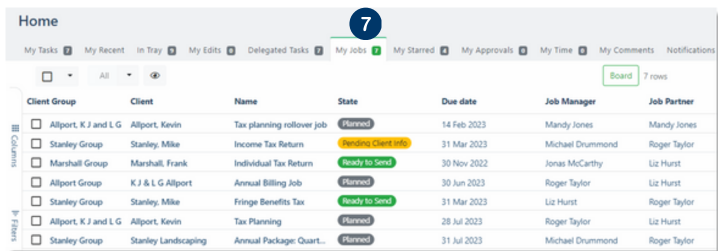
4 **User roles** are available to allocate to the job from the Custom Fields tab.



## What this means for your team

5 All users will be able to update job states from the job drawer, job summary list, job list using bulk update or by dragging the job in the Jobs Board.

6 FYI Admins and those with the Edit Jobs permissions, can update all other key details and custom fields for jobs.



## Using 'My Jobs'

7 All jobs, despite the selected view, appearing in your **My Jobs** tab in your **Home Workspace** are active jobs you have been assigned to in the job details or custom user role.

Note: User Roles must be mapped in Practice Settings - Jobs in the Mappings tab for jobs to appear in the Home Workspace - My Jobs tab. FYI Admins can configure this for each role.

# Best Practice for Billing & Workflow Jobs

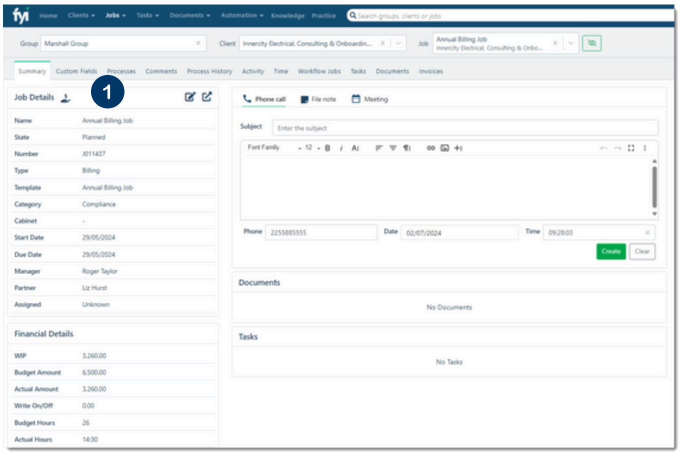
## Overview

We recommend Billing and Workflow Jobs for practices that are billing clients under a fixed fee arrangement that incorporates different projects.

The Billing Job is the "main" job and contain "sub-jobs" (Workflow Jobs). Workflow Jobs are linked to a Billing Job, each "sub-job" reflects a project and has its own Budget Hours and Budget Amounts.

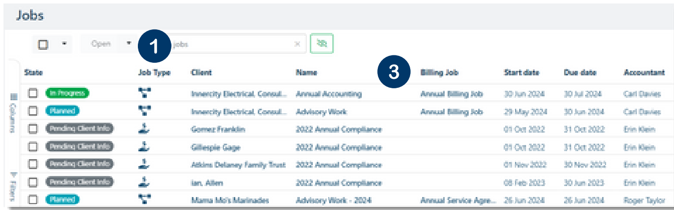
The Budget and Time from the "sub-jobs" are rolled up to the "main" job allowing for ease of invoicing and WIP reporting, whilst maintaining visibility on the work required to be completed for clients.

The job type displays in Job Lists and in the Job - Summary tab with the following icons:



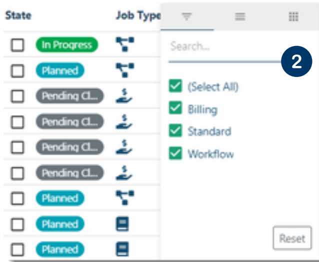

1 **Billing Job**

**Workflow Job**




## What this means in FYI

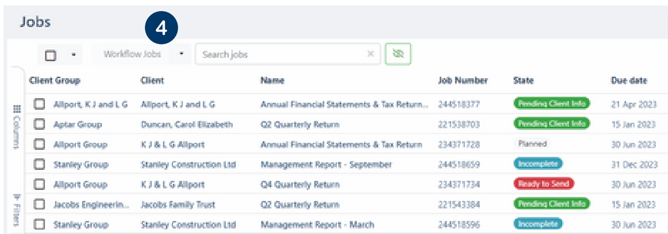
2 Practices are able to include **Job Type** into views and filter as needed to simplify views and lists.




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

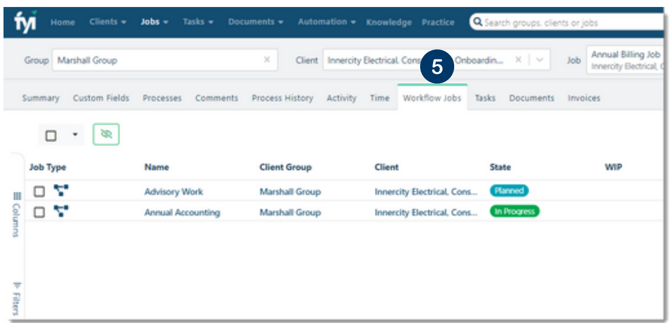
4 You can filter on workflow jobs only for your accounting & bookkeeping teams, a particular job name for your admin team and have a dedicated view for billing jobs for your management team.

The depth of how you can **customise your views** means there's a solution for everyone!




5 Select the **Workflow Jobs tab** to display a snapshot of all workflow jobs within a specific billing job.

And similarly select the **Billing Job tab** to display the billing job associated with a workflow job.




## Important notes

- **Job categories** assigned to Billing Jobs will populate against the Workflow Jobs. This can be used for filtering of views.
- **Time entries** can be added to only Workflow Jobs. Time entries are displayed on both Billing and Workflow Jobs, the time from Workflow Jobs is rolled up to the Billing Job.

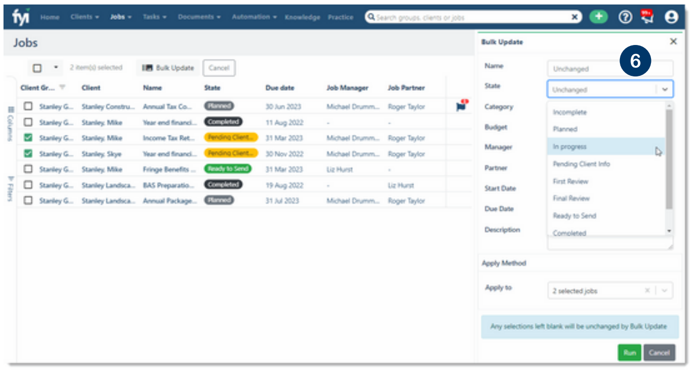
# Best Practice for Billing & Workflow Jobs

## What this means for your team

6 All users will be able to update job states for both Billing and Workflow Jobs - from the job drawer, job summary list or job list, using bulk update or by dragging jobs in the Jobs Board.

FYI Admins and those with edit job permission will be able to update all other key details and custom fields for jobs - either per job or in bulk!
Refer to the table.

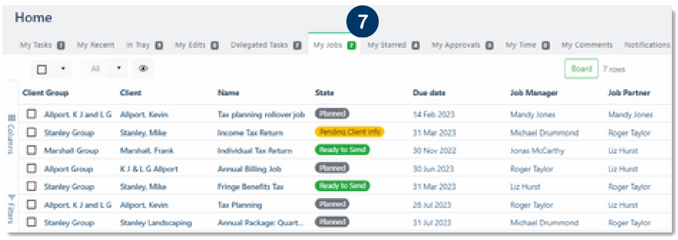
The estimated time and actual time on Billing Jobs will be totalled from all linked Workflow Jobs.




## Using 'My Jobs'

7 All jobs, despite the selected view, appearing in your **My Jobs** tab in your **Home Workspace** are active jobs you have been assigned to in the job details or custom user role.

Note: User Roles must be mapped in Practice Settings - Jobs in the Mappings tab for jobs to appear in the Home Workspace - My Jobs tab. FYI Administrators can configure this for each role.




## User roles as assigned users

Once User Roles have been created, they must be mapped in Practice Settings - Jobs.

The **Assigned User Roles** feature allows practices to assign active users to roles in the job, such as accountant or bookkeeper, as a way to allocate the job to team members.

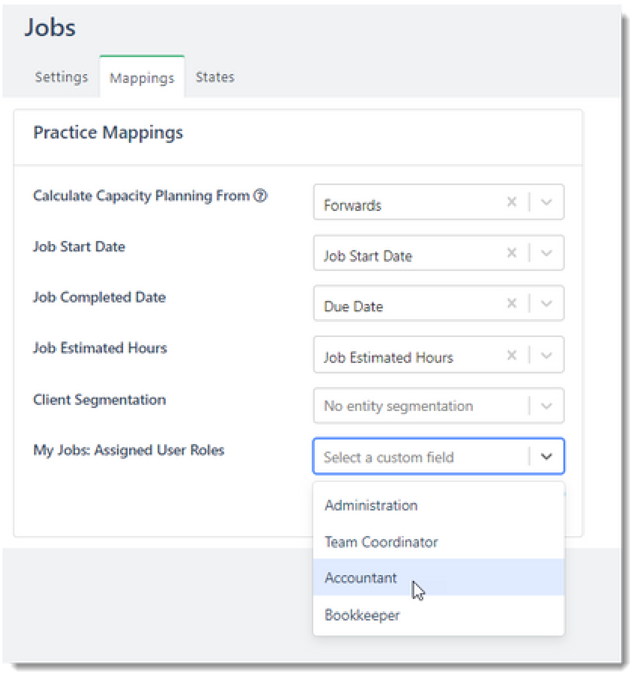
This also allows the relevant job(s):

- To display in My Jobs for the selected user
- Assigned User initials display in the Jobs Board

The Custom User Role can also be used to:

- Sort and filter Job Lists and be used in views
- Select the role in a task or workflow from an automation step to the user role, and have it automatically assign to the user.

**Learn more about managing mappings**




Manage jobs and record time the easy way.

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