

# WIP Write Off Completed Jobs Process Automation



Elite Plan

## About this automation:

Use this process to streamline your WIP management by auto-creating invoices for completed client work.



Simply import the sample automation, customise to suit your practice, test and activate!

Details History Activity

Status: ACTIVE [Test] [Back]

Name: FYI: WIP Write Off Completed Jobs

Description: This process raises a draft invoice for the manager to review and approve each month on jobs with a completed status with a WIP balance greater than 0.

Trigger: Schedule  
On the last day of each month from 1 Jan 2025

Filter: Job - View Filters  
View: Completed Jobs with Outstanding WIP

Owner: Cathy Woods

Start From: 09/01/2025

Last Run: Not yet run

Next Run: Friday, 31 January 2025 03:00

## What's included:

- Automation Process Steps

**FYI: WIP Write Off Completed Jobs**

This process raises a draft invoice for the manager to review and approve each month on jobs with a completed status with a WIP balance greater than 0.

Invoice Remaining WIP 31/01/2025

Selected Jobs	WIP	Amount
Individual tax return - 2023	\$1,274.31	\$0.00

Invoice Details:

- Invoice Number: 002271461
- Date: 09/01/2025
- Due Date: 20/02/2025
- Invoice Amount: \$0.00
- WIP Carried Forward: \$0.00
- Write Off/Off: (\$1,274.31)

Status: ACTIVE [Test] [Back]

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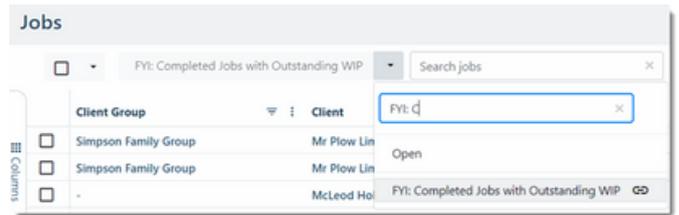
[Reset] [Add Step]

Step	Application	Action
1	FYI Actions	<p>Create Invoice</p> <ul style="list-style-type: none"><li>The document will be filed as "invoice Remaining WIP [[:now]]   end_of:"month"] date: "[:tid/tem/tnv]]" in the Correspondence cabinet</li><li>A comment will be created</li></ul> <p>Notes</p> <p>Review and update the invoice details as required.</p> <p>Workflow is being used to send the invoice for approval to the Job Manager. Consider reviewing and updating the User Role if required.</p> <p>A Comment is being created to provide details to team members that there are WIP balances on jobs that have been 'completed'.</p>

# How to import:

Before you begin, ensure your View has been saved in the Jobs list with the following filters (or those relevant for your WIP Write Off requirements):

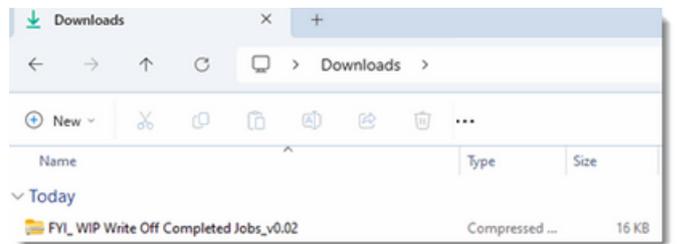
- "Completed Jobs with Outstanding WIP" View
  - Job State = Completed
  - WIP = Greater than 0



## Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You do not need to extract the files.

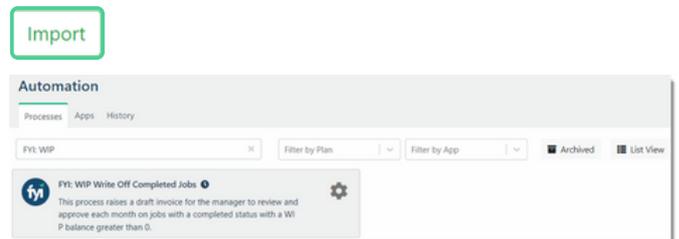


## Step 2 - Import the files into FYI

Navigate to Automation - Processes and click the Import button on the right-hand side of the screen.

Locate and select your saved "WIP Write Off Completed Jobs" file and click Open to import the automation.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



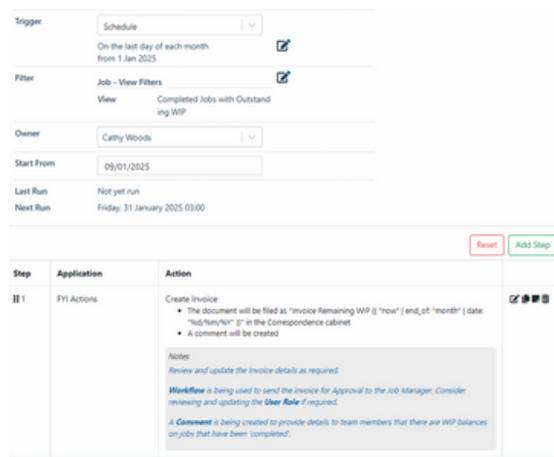
## Step 3 - Review the process

The Process is imported with the Status set to Draft.

You can locate the process by searching in the "Search processes" field.

This process uses the Completed Jobs with Outstanding WIP View, which is the custom view you created in the Job Lists.

- Review the schedule
- Review the process owner
- Review and update each process step. Specific comments have been added to the steps where action is required. These will display in blue.



## Step 4 - Test and run the automation

Click the Test button to display a list of all jobs that fit the invoicing criteria.

Search and select a specific job to run the test for and select Run Test.

Go to the Job Workspace - Invoices tab or the Practice - Invoices List to review the draft invoice.

When ready, set the Status to Active.

- This automation is set to run automatically on the last day of the month from the commencement date.

