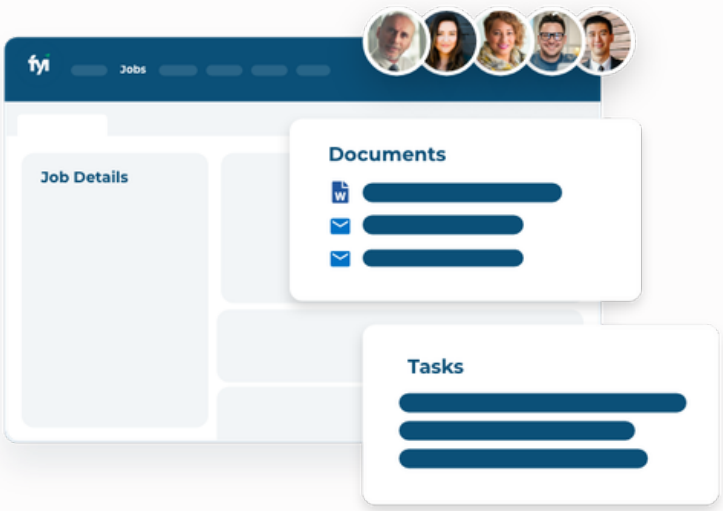
Job Management Toolkit

Automation Essentials

Deliver effortlessly at scale. From first task to final tick, automate the work behind the work.

From creation to rollover, FYI takes care of the job admin - so your team can focus on what matters. Reliable workflows, real results: over $55K in annual savings and 3+ hours saved per job.

- **3x Automations to deliver consistent workflows**
- **Templates you can personalise in minutes**
- **Bonus: Job State Tracking Automation**

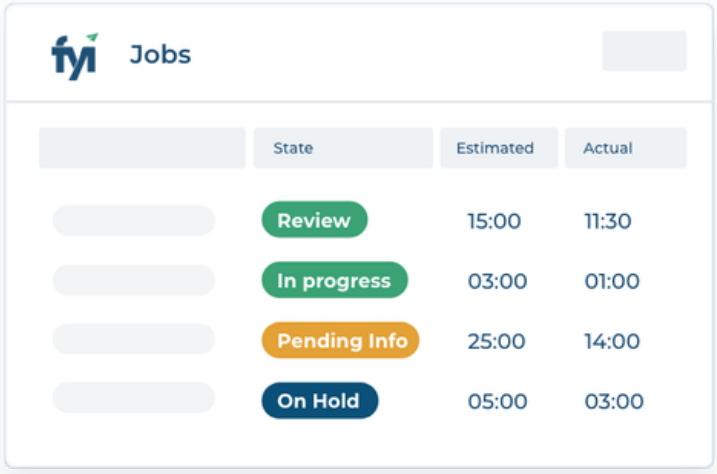


Job management shouldn't feel like a full-time job. That's where FYI steps in - handling the job admin so your team can focus on what matters most. From the first task to the final tick, FYI streamlines job management automatically. No more chasing approvals, duplicating efforts, or juggling spreadsheets. It's all handled in one place and built to keep your team focused.

This toolkit is designed to cover your job management essentials - offering ready-to-go automation for setting up jobs, assigning tasks, updating job states, and rolling jobs over for recurring work.

With FYI, automation isn't just a time-saver - it's a results driver. Practices using FYI Automations for job management report saving over 3 hours per job and seeing upwards of $55K in annual savings. That's not just productivity - that's profitability.

Whether you're scaling up or looking to sharpen your operations, this toolkit shows you how to deliver more, consistently. Because when the admin runs itself, your team can run ahead.



Set your job management to autopilot

Year-end that runs itself, because you've got bigger things to do

Take the pressure off the team in the busiest time of the year, with automated job updates, task allocation, document creation, and full visibility for proactive planning. Take control for a stress-free year-end.

Recurring jobs that run like clockwork, keeping you on track

Set and forget recurring obligations for clients, with automated job and task management, ensuring nothing slips through the cracks and guesswork is eliminated. Everything you need every period, on time, every time.

Skip the setup, roll jobs automatically - so you can move forward

Remove the manual work, starting jobs from scratch. Automatically carry all details from the last job to the next, and more. No more reinventing the wheel every time, every job - with job rollover you'll always be a step ahead, automatically.

Spot bottlenecks early, insights that keep you moving

With instant visibility across every job, you can quickly identify delays and take action before they impact deadlines. It's smarter, faster job management that puts you back in control - without the need for manual check-ins.

> When I did the numbers and 4,000 hours dropped out, I thought, 'No, that can't be right'. But when we looked at it further, we're like, 'No, it is right'.
>
> It worked out to be half a day per staff member every week. And when you consider that the billable hours availability goes up significantly, that's a potential of $400,000. That's huge for us.
>
> I had to get an accountant to check my numbers because I thought 'I've missed a zero here'. But I didn't – they were the numbers.
>
> We've had it for six months – that's crazy numbers.
>
> JASON,
> PROJECT MANAGER & SHAREHOLDER
> WALLACE DIACK

The results your practice can unlock with this toolkit:

- **3+ hours saved per job (cumulatively)**
- **$55k+ annual savings**
- **Consistent & scalable processes**

Annual Compliance: complete visibility when you need it most

Stay in control during your busiest season with clear oversight on every job, deadline and step.

Remove the stress of chasing tasks and updates - with FYI's automated compliance workflow.

Managing annual compliance manually can be overwhelming. Juggling task assignments, tracking job progress, and creating key documents - while trying to hit deadlines - often leading to missed steps, delays, and unnecessary stress. Without a streamlined process, staying on top of every moving part during your busiest season is a constant challenge.

FYI's year-end start-to-finish automation tackles these challenges by streamlining every stage of the workflow. Automatically assigning tasks to the right team members at the right time, updating job states to reflect progress, and generating essential documents. This ensures every step is completed accurately and on time, reducing the admin burden on your team and allowing your practice to focus on delivering quality work, maintaining compliance, whilst meeting deadlines with confidence.



Your return* per year:
215+ hours saved
$32,500+ recovered

*based on breakdown below, at $150/hr for 100 jobs.

70%+ time savings on job management

Real-time job visibility with fewer internal check-ins

Improved accuracy and audit-readiness



Document Templates

Ready-to-use Templates all easy to customise to your requirements.



Sequenced Process Steps

Pre-configured steps for a smooth, consistent compliance process, year after year.

Pre FYI Automation "Old Way"	Automation with FYI "New Way"	Savings Unlocked with FYI Automation Payoff*
Manually tracking or chasing jobs, often leading to missed deadlines	**Jobs list tracking and automated updates**, real-time visibility on progress of work	1.5 hours $225
Manually chasing clients, relying on team members to request and collect information	**Automated client emails and tasks**, pre-defined with complete visibility on progress	25 mins $62.50
Lack of structured process, unclear tasks, copy-pasting prior documents, high admin strain	**Tasks and documents auto-created and assigned**, scalable and consistent experience	15 mins $37.50



Run year-end with confidence and consistency your team can count on - download the process now

Recurring Jobs: built in precision so you never miss a deadline

Put your workflows on repeat, so you can deliver on time every time - no extensions required.

Give your team peace of mind that nothing slips - with FYI's automated recurring jobs.

Managing recurring jobs manually, such as activity statement jobs, can quickly turn into a repetitive grind. Creating jobs each month or quarter, assigning tasks, chasing progress, and tracking lodgement dates - all while juggling other deadlines - leaves too much room for error. With so many moving parts across so many clients, even the smallest oversight can lead to missed deadlines, last-minute extensions, and unnecessary stress for your team.

FYI's recurring Activity Statement job automation takes the pressure off. Jobs are created automatically to your schedule, for all applicable clients, ensuring nothing gets missed and everything stays on track. With automation handling the repetition, you can deliver every obligation on time - with full confidence.

Note: This automation example uses activity statements but can be customised for any recurring work - such as GST, quarterly reports, or payroll.



Your return* per year:
170+ hours saved
$8,750+ recovered

*based on breakdown below, at $150/hr for 100 jobs.

80%+ time savings on job setup and tracking

Real-time job visibility, clarity on what's due and when

Improved lodgment program performance with fewer deadline risks



Sequenced Process Steps

Pre-configured steps for a smooth, consistent recurring jobs, ontime, every time.

Pre FYI Automation "Old Way"	Automation with FYI "New Way"	Savings Unlocked with FYI Automation Payoff*
Manually creating jobs, or creating list of work required, often leading to missed clients	**Automated job creation**, with correct assignments and details so the team have full visibility	15 mins $37.50
Manually monitoring deadlines, relying on team members to track key due dates for their clients	**Automated due date and job assignments**, transparency into upcoming obligations and capacity	10 mins $25.00
Manually tracking or chasing jobs, often leading to missed deadlines	**Jobs list tracking and automated updates**, real-time visibility on progress of work	10 mins $25.00



Turn your recurring work into clock work, never miss a deadline again - activate the process now

Job Rollover: your seamless transition from one job to the next

Skip the rework - automatically carry forward your job details, so every job starts smarter.

Ensure continuity across team and clients and stay ahead - with FYI's automated job rollovers.

Manually creating new jobs each year can be time-consuming, inconsistent, and prone to error. Re-entering job names, details, due dates and responsibilities often leads to duplication, missed clients, and extra admin. Without a structured process, rolling over work from one year to the next becomes a manual drain on your team's time - and risks things falling through the cracks.

FYI's automated Job Rollover process eliminates that burden. Automatically creating next year's jobs using the structure, details and custom fields from the previous year. Ensure your team hits the ground running every year, with clear continuity and visibility on client work and deadlines. It's a smarter, scalable way to build momentum and accuracy into your workflows - so you're always one step ahead.



Your return* per year:
170+ hours saved
$8,750+ recovered

*based on breakdown below, at $150hr for 100 jobs.

80%+ time savings on job setup

Smart and dynamic data population of key data and fields

Improved job visibility, for workload and lodgement program planning



Sequenced Process Steps

Pre-configured steps for a smooth and consistent rollover for jobs, every time.

Pre FYI Automation "Old Way"	Automation with FYI "New Way"	Savings Unlocked with FYI Automation Payoff*	
Manually creating jobs, or creating list of work required, often leading to missed clients	**Automated job creation**, with correct assignments and details so the team have full visibility	15 mins	$37.50
Manually monitoring deadlines, relying on team members to track key due dates for their clients	**Automated due date and job assignments**, transparency into upcoming obligations and capacity	10 mins	$25.00
Manually tracking or chasing jobs, often leading to missed deadlines	**Jobs list tracking and automated updates**, real-time visibility on progress of work	10 mins	$25.00



Roll forward with confidence and clarity your team can count on - activate the process now

BONUS AUTOMATION

Job Tracking: transparency when it matters most

Keep every job moving with confidence, staying one step ahead with automated tracking and alerts.

Eliminate bottlenecks before they become problems - with FYI's automated job state tracking.

Keeping track of job progress manually can be frustrating and unreliable. Without clear timestamps or a centralised way to track when job states change, your team is left guessing if and when a job has actually moved forward. This lack of visibility creates delays, unnecessary follow-ups, and a greater risk of deadlines slipping through the cracks.

FYI's automated job state tracking gives you instant clarity over every step in your workflow. See exactly when a job changes state, identify delays before they escalate, and take action early - without chasing team updates. With built-in oversight and a record of job movement, you'll manage deadlines with confidence, reduce bottlenecks, and stay in control of your practice's progress and KPI's at all times.



Your return*per year:
33+ hours saved
$5,000+ recovered

*based on breakdown below, at $150/hr for 100 jobs.

- **Insight into bottlenecks and ability to monitor KPI data for job turnaround**
- **Smart and dynamic notification capabilities to set and forget bottleneck monitoring**
- **Improved job visibility, for workload and lodgement program management**
- **Meaningful targeted internal discussions to keep jobs progressing**

Pre FYI Automation "Old Way"	Automation with FYI "New Way"	Savings Unlocked with FYI Automation Payoff*
Manually maintaining job states and data, relying on the team to complete job admin on time	**Automated updates**, with real time visibility on progression of client work	5 mins $12.50
Manually checking or chasing jobs, with the team, relying on team members to track jobs	**Jobs state tracking timestamped automatically**, eliminating guesswork	10 mins $25.00
Delays identifying bottlenecks, undermining deadline reliability and confusion	**Immediate, automated insight**, eliminating risks of delays and gaining KPI clairty	5 mins $12.50



Stay in control of every job, and on schedule with visibility you can trust - activate the process now

Automate your Practice

With several resources, including pre-built automations, it's easier than you think to automate your practice.

Automation Library

Check out our range of process automations, ready for you to import, create, and activate - no need to start from scratch with over 50 common processes prebuilt:

- Choose from a growing library of automations created by the FYI team.
- Auto-create emails, documents and tasks, update jobs, and more - for a range of processes used in accounting firms.
- Example templates are ready to import with just a few clicks.

Simply import, customise to suit your practice, test and activate.

Explore our Automation Library

For step-by-step instruction on importing processes to your platform refer to **Importing Custom Processes.**





Assistance to automate your practice

Whether it's just an extra hand to build an existing process or crafting tailor-made automations from scratch, our expert consultant will work closely with you to optimise your operations for maximum productivity.

Explore our Automation Services

> The way we work has been transformed. FYI has challenged us to improve our processes and to work smarter.
>
> TASH,
> PRACTICE MANAGER
> SIDCOR

Make every second count for more with FYI Process Automation.
For more information on Process Automation with FYI, visit the FYI Help Centre at support.fyi.app

More time for more

fyi.app