Jobs Best Practice Guide

Pro Plan

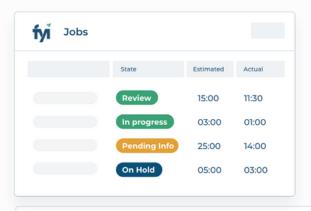
Intermediate Plan

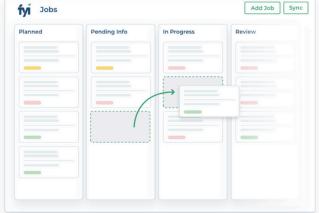


Getting the most out of Jobs in FYI

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

All emails and documents can be filed against the relevant job in FYI - whether you use Standard Jobs or Workflow Jobs in FYI.

And from there, pre-populated time entries can be completed within a few clicks and synced back to XPM.

When you start your trial with FYI, your active jobs will sync from Xero Practice Manager (XPM).

Note: Workflow Jobs are referred to as XPM Workflow Jobs in the Help Centre for Intermediate & Pro users. To get started:

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

Similar to XPM, 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 current job configuration in Xero Practice Manager.

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; 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.

Keeping jobs up to date

Key job details and custom fields sync from XPM to FYI, and vice versa whenever a job is created or a standard job is edited.

Total 'Estimated' hours added to XPM Tasks sync to FYI, and all submitted time is displayed as 'Actual'. The net result is displayed as 'Variance'.

The list and board views give you instant visibility on how each job is tracking.

The need to jump back and forth to XPM is minimised. From FYI you can update the job:

• Name

• Partner & Manager

Pro Plan

- State
- Custom Fields
- BudgetStart Date & Due Date
 - User Roles. Date

And what's more, you can do all the above in bulk!

And just like in XPM, users need permission to edit any details other than job state.

FYI emails, documents and tasks can be filed to the relevant job.

Making the most of custom fields

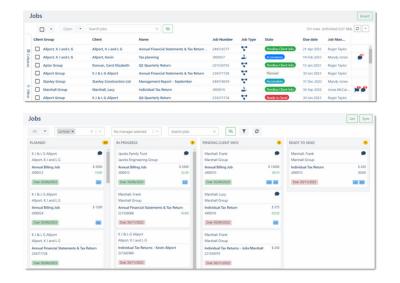
Custom fields can be created by an FYI Admin, and edited by those with appropriate permissions.

Custom fields on Standard Jobs sync back to XPM, ensuring that platforms remain in sync.

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.



Job Details 📒	!	c c
Name	Annual Compliance	
State	First Review	
Cabinet	-	
Category	Annual Service Agreement	
Туре	Standard	
Budget	1500.00	
Estimated	73:00	
Actual	34:05	
Start Date	22/06/2023	
Due Date	30/06/2024	
Manager	Jonas McCarthy	
Partner	Liz Hurst	
Assigned	Liz Hurst, Jonas McCarthy	
Number	J000010	

Custom Fields		Hide Blank 🛛 🖍
Search custom fields		×
Accountant	Michael Drummond	
Admin	Anna Jordan	
Cadet Accountant	Mandy Jones	
Office	Coolsville	
Planned Date	4 Sep 2023	
Type of Service	Compliance	
Work In	18 Jul 2023	
Sync from PM		

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.

Jobs created in FYI sync back to XPM.

Your job templates will be available when creating jobs within FYI, along with all other key job fields.

Learn more about creating jobs in FYI

Learn more about creating jobs as an Automation step

Custom Fields		Hide Blank OFF
Accountant		×
Accountant	Michael Drum 🗙 🛛 🗸	
Cadet Accountant	Me	
Senior Accountant	Aaron Timms Jonas McCarthy	
	Liz Hurst	
	Mandy Jones	
	Michael Drummond	
	Roger Taylor	
	Suzanne Burnett	



Permissions for Jobs

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

1	Create Jobs - create Jobs in FYI that are synced
-	to XPM



3	Edit Jobs - edit the key details for the Job
	including Partner and Manager

4	Practice Activity - display a summary of
-	updates to and from XPM and other apps.

Learn more about managing user groups

ettings	Account	Custom Fields	Devices	Tasks	Users	User Groups	Views	
Name								
Admir	n Team							
Group								
Permis	sions							
Permis	ssions							
Auto	omations							ON
Crea	ite Jobs						1	ON
Crea	ite Reports							OFF
Edit	Clients							OFF
Edit	Custom Fie	lds					2	OFF
Edit	Jobs						3	ON
Expo	ort Client Li	st						OFF
Kno	wledge							ON
Prac	tice Activity	/					4	ON
Shar	e settings							Off
Tem	plates							ON
View	vs							OFF
							s	ave Cancel

Best Practice for Standard Jobs

Overview

This is the default setting in FYI, which means this will be your out of the box solution, with no settings to update.

We recommend Standard Jobs for practices that either:

- Create an XPM Job for each piece of work they complete for their client
- Do not want or need to track and monitor XPM tasks.
- 1 The estimated time and actual time will be totalled from all tasks on the job, and the assigned user pulls directly from the job in XPM.

What this means in FYI

The jobs in FYI will match your XPM jobs, and you will be able to update key details and custom fields either per job or in bulk!

Changes made in both FYI or XPM will sync to the other.



The job's XPM tasks will appear in the **XPM Tasks** tab for each Job.

3 User roles are available and will sync back to XPM as a custom field.

What this means for your team



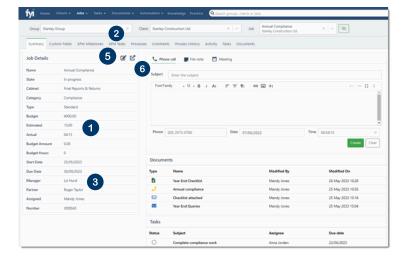
5 FYI Admins and those with Edit Job permission enabled, will be able to update all other key details and custom fields for jobs.

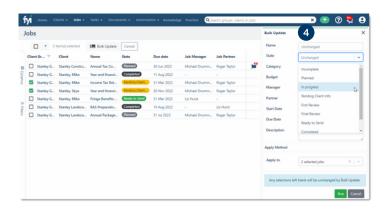
6 Users will need to jump back into XPM to update the Job Schedule to assign users to a job.

Using 'My Jobs'









	Home My Tasks 🛛 My Recent	In Tray D My Edits	Delegated Tasks 2	7 My Jobs 2 My Starred	My Approvals	My Time 🚺 My Comme	nts Notifications
	AI	• •				Board	7 rows
	Client Group	Client	Name	State	Due date	Job Manager	Job Partner
	Allport, K J and L G	Allport, Kevin	Tax planning rollover job	Planned	14 Feb 2023	Mandy Jones	Mandy Jones
ŝ	Stanley Group	Stanley, Mike	Income Tax Return	Pending Client Info	31 Mar 2023	Michael Drummond	Roger Taylor
n s	Marshall Group	Marshall, Frank	Individual Tax Return	Ready to Send	30 Nov 2022	Jonas McCarthy	Liz Hurst
	Allport Group	K J & L G Allport	Annual Billing Job	Planned	30 Jun 2023	Roger Taylor	Liz Hurst
	Stanley Group	Stanley, Mike	Fringe Benefits Tax	Ready to Send	31 Mar 2023	Liz Hurst	Roger Taylor
▶ Filter	Allport, K J and L G	Allport, Kevin	Tax Planning	Planned	28 Jul 2023	Roger Taylor	Liz Hurst
Sue	Stanley Group	Stanley Landscaping	Annual Package: Quart	Planned	31 Jul 2023	Michael Drummond	Roger Taylor

Best Practice for XPM Workflow Jobs

Overview Using Xero's fixed fee best practice

We recommend Workflow Jobs for practices using an Annual Billing Job set up in XPM who want to monitor and track their XPM tasks.

The problem we are solving with workflow jobs is to:

- provide transparency to XPM Tasks
- remove the challenge of being able to adequately track workflow for each interim piece of work
- keep FYI's jobs features at you fingertips.

Plus there is no need for double entry - all of the information is already available in XPM.

Your job list in FYI will reflect both XPM Jobs & XPM Tasks. With job states now available for XPM Tasks in FYI, workflow has never been so easy!

What this means in FYI



Billing Jobs - these are XPM Jobs

- 🜪 Workflow Jobs these are XPM Tasks
- 2 Practices are able to include Job Type into views and filter as needed to simplify views and lists.
- 3 Easily recognise the type of job in the Summary tab in the Job Workspace.

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!

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 Standard Jobs will populate against the Workflow Jobs at the initial sync. This can be used for filtering of views.
- XPM tasks will no longer appear as a tab within a Billing Job. This is replaced by the Workflow Jobs Tab.
- Jobs created in FYI are created as a Standard Job. Where you have used a template or added an XPM Task to the job in XPM, it will sync those back to FYI as Workflow Jobs.
- Time entries can be added to both Billing Jobs and Workflow Jobs.
- We do not sync XPM Task custom fields. You can use job custom fields to achieve the same result in FYI.



Jo	obs								Board
	Open •	Search jobs	× 82		1		101 rows (n	efreshed 6:27 AM)	0.
1	Client Group	Client	Name	Job Number	Job Type	State	Due date	Job Man	
	Allport, K J and L G	Allport, K J and L G	Annual Financial Statements & Tax Return	244518377	71	Pending Client Info	21 Apr 2023	Roger Taylor	
	Allport, K J and L G	Allport, Kevin	Tax planning	3000027	2	In progress	14 Feb 2023	Mandy Jones	\$
	Aptar Group	Duncan, Carol Elizabeth	Q2 Quarterly Return	221538703	S	Pendina Client Info	15 Jan 2023	Roger Taylor	
	Allport Group	K J & L G Allport	Annual Financial Statements & Tax Return	234371728	2.	Flanned	30 Jun 2023	Roger Taylor	
	Stanley Group	Stanley Construction Ltd	Management Report - September	244518659	S	Incomplete	31 Dec 2023	Mandy Jones	
	Marshall Group	Marshall, Lucy	Individual Tax Return	3000016	2	Pending Client Info	30 Sep 2022	Jonas McCar	µ₽¢₽
	Allport Group	K J & L G Allport	O4 Quarterly Return	234371734	71	Ready to Send	30 Jun 2023	Roger Taylor	

Ctate Job Type 1 Search. 2 7 (Select All) 7 Billing 1 **Pending Client** Workflo 7 Υ. Reset ÷ Planned



J	obs		4				
		• Workflo	w Jobs 🔹 Search jobs	×			
	Client	Group	Client	Name	Job Number	State	Due date
		Allport, K J and L G	Allport, K J and L G	Annual Financial Statements & Tax Return	244518377	Pending Client Info	21 Apr 2023
Columns		Aptar Group	Duncan, Carol Elizabeth	Q2 Quarterly Return	221538703	Pending Client Info	15 Jan 2023
suu		Allport Group	K J & L G Allport	Annual Financial Statements & Tax Return	234371728	Planned	30 Jun 2023
		itanley Group	Stanley Construction Ltd	Management Report - September	244518659	Incomplete	31 Dec 2023
		Allport Group	K J & L G Allport	Q4 Quarterly Return	234371734	Ready to Send	30 Jun 2023
Filters		acobs Engineerin	Jacobs Family Trust	Q2 Quarterly Return	221543384	Pending Client Info	15 Jan 2023
ters		itanley Group	Stanley Construction Ltd	Management Report - March	244518596	Incomplete	30 Jun 2023

1	Group Marsha	Il Group		X Client Marshall, Frank	5	K V Job Annual Marsha	Compliance I. Frank
5	iummary Cu	stom Fields XPM N	Allestones Processes	Comments Process History Activity	Workflow Jobs	Tasks Documents	
	•	80					
	Job Type	Client Group	Client	Name	Job Number	State	Due date
	0.5	Marshall Group	Marshall, Frank	Individual Tax Returns - Julia Marshall	221539070	Pending Client Info	30 Nov 202
2		Marshall Group	Marshall, Frank	Annual Financial Statements & Tax Return	221539068	In progress	31 Mar 202
1		Marshall Group	Marshall, Frank	Q3 Quarterly Return	221539073	Planned	15 Apr 2023
		Marshall Group	Marshall, Frank	Tax Return Preparation - F & J Marshall	221539280	In progress	30 Nov 202
	0 5	Marshall Group	Marshall, Frank	Payroll Processing	221539134	Planned	22 Jun 202
In Filmer	0.5	Marshall Group	Marshall, Frank	Q4 Quarterly Return	221539074	Planned	15 Jul 2023
εı	0.5	Marshall Group	Marshall, Frank	Tax Planning Advice	221539075	Planned	22 Jun 202

Best Practice for XPM Workflow Jobs

What this means for your team

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 tasks on the job. For Workflow Jobs, this is synced from the XPM Task.

The Start Date and Due Date for Workflow Jobs will initially sync from the XPM Job <u>unless</u> the dates have been scheduled in the XPM Task.

Important notes

- Changes made to the XPM Task Name + Label, and Estimated Hours in XPM will sync back to the workflow job in FYI
- Deleting a task in XPM will set the Workflow Job to a cancelled state in FYI
- Deleting a Job in XPM will delete the Standard and Workflow Jobs in FYI
- Clicking the 'Open in PM' icon for a workflow job, opens the XPM Task in XPM, whereas for a standard job the icon will open the XPM Job in XPM.

User roles as assigned users for workflow jobs

It is recommended for practices to adopt Assigned User Roles feature for workflow jobs. This allows practices to assign active users to roles in the job, such as accountant or bookkeeper, as a way to allocate the workflow job to team members.

The benefits of this are:

- The workflow job displays in My Jobs for the selected user
- The Assigned User initials display in the Jobs Board
- The User Role is an available column in the Jobs Lists and can be sorted, filtered and 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.

Note:

Assigned User Roles do not sync back to XPM Tasks.

Update to	Standard Job	Workflow Job	
Job Name	Yes	No, a workflow job name cannot be updated	
State	Yes	Yes, where you choose a completed or cancelled state FYI will auto- complete the XPM Task	
Budget	Yes	Yes but does not sync back to XPM	
Start & Due Date	Yes, updates Job Schedule	Yes, but does not sync back to XPM	
Job Partner & Manager	Yes	Yes but does not sync back to XPM Task	
Custom Fields	Yes	Yes but does not sync back to XPM Task	
User Roles	Yes, syncs back as custom field	Yes but does not sync back to XPM Task	

Jobs

Settings Mappings States				
Practice Mappings				
Calculate Capacity Planning From ⑦	Forwards	~		
Job Start Date	Job Start Date	~		
Job Completed Date	Due Date X	~		
Job Estimated Hours	Job Estimated Hours	~		
Client Segmentation	No entity segmentation	~		
My Jobs: Assigned User Roles	Select a custom field	~		
	Administration			
	Team Coordinator			
	Accountant			
	Bookkeeper			

Best Practice for XPM Workflow Jobs

Using 'My Jobs'

Display all jobs assigned to you in your Home Workspace. Access the Jobs List or Jobs Board and update the job state or any other key details of workflow or billing jobs.

All billing jobs in My Jobs are active jobs you have been allocated to from the job schedule in XPM.

All workflow jobs are active jobs you have been assigned to via a mapped User Role.

My Tasks 🖸 My Recent My Edits	My Starred D In Tray D My Jo	bs 🛃 My Approvals 🛐 Delegated Ta	isks 🚺 My Time 🔯 My Comments
All No partner sele	No manager sel	bs × 👁 T C	List
PLANNED 2	PENDING CLIENT INFO 1	IN PROGRESS	AT REVIEW
Trevino Jothon Trevino Jothon	Davian Cleveland Davian Cleveland	Due: 14/10/2021	Sasha. Dickerson Dickerson Sasha
2021 - Q2 management rep \$1500 J007156	2021 - Year end financial rep \$4000 J007531	Britton Inc Britton Trucking	2021 - Q2 management rep \$1500 J007615
Due: 29/04/2022	Due: 15/09/2021	2021 Annual Compliance \$1000 J007319	Due: 22/01/2022
Stanley, Sky Stanley Group		Due: 30/05/2022	
Compliance \$2000 J006795		Wilson Group Wilson Group	
Due: 12/08/2021		2021 Annual Compliance J007327	
		Due: 30/06/2022	

Enabling XPM Workflow Jobs

- Before enabling XPM Workflow Jobs, it is important to review your jobs list and complete any jobs that are no longer active. This will prevent unnecessary workflow job from being created during the initial sync.
- 2 To start using Workflow Jobs feature, an FYI Admin must set the 'XPM Workflow Jobs' setting to 'On'. This is located in Practice Settings - Jobs - Settings.

This will start the initial sync of incomplete XPM Tasks on your open XPM Jobs and populate your Workflow Jobs in FYI.



Important notes

- Incomplete XPM Tasks attached to closed XPM jobs will not sync to FYI.
- Once enabled, Workflow Jobs cannot be disabled.

3 Set up the User Roles mapping in Practice Settings
 - Jobs - Mappings.

Update 'Workflow Jobs: Assigned User Roles', and select the User Roles that reflect assigned users in workflow jobs. Multiple roles can be selected.

For example, this may include Accountant, Reviewer and Bookkeeper.

Learn more about managing mappings

obs Settings Mappings States		
Practice Mappings		
Calculate Capacity Planning From ①	Forwards	x ~
lob Start Date	Job Start Date	x ~
lob Completed Date	Due Date	$\times \mid \cdot \!\!\!\!\!\!\!\!\!\!\!\!\!\!$
Job Estimated Hours	Job Estimated Hours	$\times \mid \sim$
Client Segmentation	No entity segmentation	~
Ay Jobs: Assigned User Roles	Select a custom field	~
	Administration	
	Team Coordinator	
	Accountant	
	Bookkeeper	

Manage jobs and record time the easy way.

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