

# Top Tips for Milestone Tracking

## Best Practice Guide



### Manage your work with maximum efficiency

Use Custom Fields to tailor job management for your practice and manage jobs in real time.



- ✔ Overview of Milestone Tracking
- ✔ Why use it
- ✔ Working with Milestone Tracking
- ✔ Monitoring & Reporting

	State	Estimated	Actual
	Review	15:00	11:30
	In progress	03:00	01:00
	Pending Info	25:00	14:00
	On Hold	05:00	03:00

### Overview of Milestone Tracking

FYI allows practices to know where every job stands across the entire team, allowing you to view jobs by partner or manager and more so you can quickly keep track of time spent vs budget, spot bottlenecks and manage jobs real time.

With Job Custom Fields in FYI, job management can truly be tailored to the needs and requirements of each practice allowing practice's to manage work with maximum efficiency.

A common requirement and key element to job management and reporting is the ability to track milestones for jobs, allowing practices to analyse their data further to determine issues in process and true turnaround time for client work.

### Why use it?

Milestone tracking allows you to track progress, help teams stay on track and report accurately on a range of KPI's for your practice to truly understand performance.

Client	Name	Job Num...	State	Start date	Due date	Estimated	Actual	Variance	Budget	Job Manager	Job Partner
Stanley Renovation Proje...	Annual Billing Job	J000050	Planned	03 Jul 2023	28 Jun 2024	17:00	00:00	17:00	4,500.00	Mandy Jones	Liz Hurst
Duncan, Carol Elizabeth	Annual Billing Job	J000009	Final Review	01 Jun 2022	31 Mar 2023	35:00	07:40	27:20	9,500.00	Michael Drummond	Roger Taylor
Alcoa United	Annual Billing Job	J000011	Pending Client Info	01 Jun 2022	30 Apr 2023	19:00	00:00	19:00	6,000.00	Michael Drummond	Roger Taylor
K J & L G Allport	Annual Billing Job	J000051	In progress	01 Jul 2023	29 Mar 2024	44:00	10:00	34:00	4,500.00	Mandy Jones	Liz Hurst
Jacobs Family Trust	Annual Billing Job	J000013	In progress	22 Jun 2022	30 Jun 2023	38:00	05:30	32:30	5,500.00	Jonas McCarthy	Liz Hurst
Stanley Landscaping	Annual Compliance	J000040	Planned	23 May 2023	30 Sep 2023	15:00	00:00	15:00	2,500.00	Michael Drummond	Liz Hurst
Marshall, Frank	Annual Compliance	J000010	Planned	22 Jun 2022	30 Jun 2023	73:00	33:50	39:10	1,500.00	Jonas McCarthy	Liz Hurst
Stanley Construction Ltd	Annual Compliance	J000043	Planned	25 May 2023	30 Sep 2023	15:00	04:15	10:45	4,000.00	Michael Drummond	Roger Taylor
Allport, K J and L G	Annual Financial Statement...	J000029	First Review	01 Sep 2022	21 Apr 2023	15:00	00:00	15:00	4,000.00	Roger Taylor	Liz Hurst
Stanley Landscaping	Annual Package: Quarterly ...	J000020	Final Review	03 Jul 2023	30 Apr 2024	08:00	01:00	07:00	1,000.00	Michael Drummond	Roger Taylor
Stanley, Mike	Fringe Benefits Tax	J000028	Ready to Send	01 Mar 2023	31 May 2023	00:00	00:00	00:00	250.00	Michael Drummond	Roger Taylor
Stanley, Skye	Income Tax Return	J000030	Planned	06 Jul 2023	31 Jul 2023	03:00	00:00	03:00	350.00	Michael Drummond	Roger Taylor

# Working with Milestone Tracking

## How to Set up Milestone Tracking

Job Custom Fields in FYI make the ability to do this super easy and what's more, you can automate it using Custom Processes to ensure nothing is missed and data is accurate.

This best practice guide covers how to setup the tracking of dates for activities completed for an annual compliance job to provide an example of the possibilities of Job Custom Fields with FYI.

- 1 Go to **Practice Settings** and select **General**.
- 2 Select the **Custom Fields** tab.

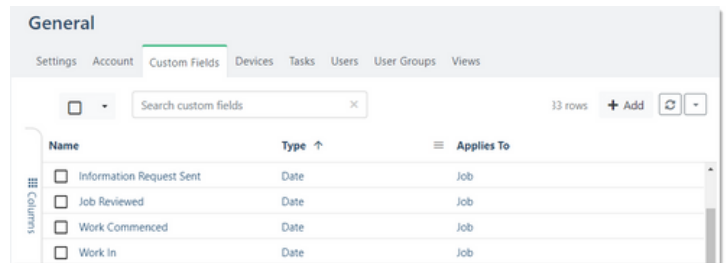
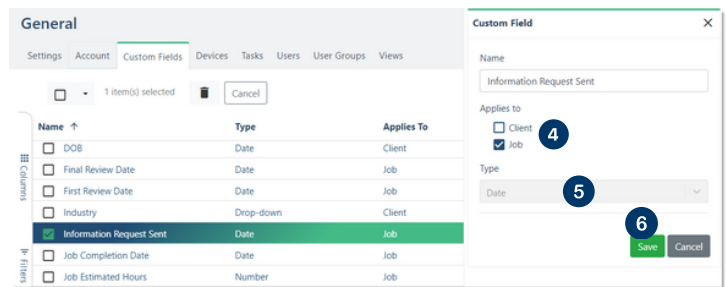
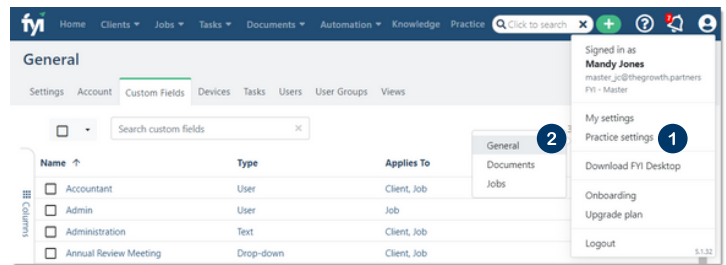
The **key milestones** to track are:

- Information request sent
- Work In
- Work Commenced
- Job Reviewed
- Work Complete

Note: you need to be an FYI Admin or have Custom Field permissions to create these fields.

Click **+ Add** to create a new Custom Field.

- 3 Add the **Name** of the new Custom Field
- 4 Select whether it **applies** to Clients or only Jobs.
- 5 Select **Date** as the type of field.
- 6 **Save** the Custom Field to make it available for users to apply to Jobs.



## How to Apply Custom Fields to Individual Jobs

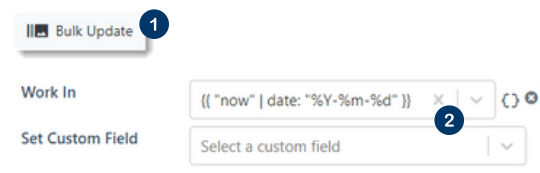
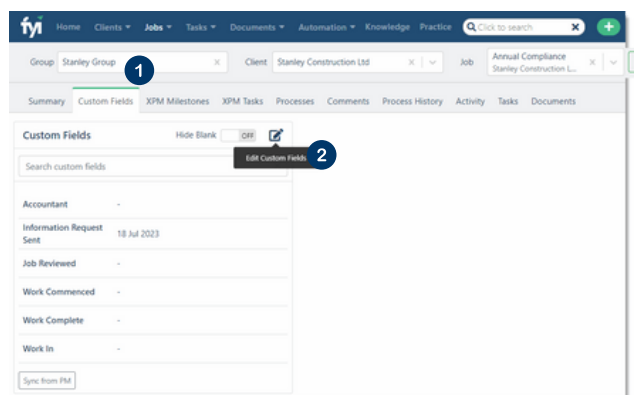
To apply custom field data on individual jobs:

- 1 Go to the Jobs workspace for the specific job and select the **Custom Fields** tab.
- 2 Click the **Edit Custom Fields** icon and populate the dates and save your changes.

## How to Apply Custom Fields to Multiple Jobs

To apply custom field data to multiple jobs at a time:

- 1 Select the relevant jobs in the Jobs list and click **Bulk Update**.
- 2 In the Bulk Update drawer, select the relevant fields in **Set Custom Field** and apply the dates. Note: you can use Merge Fields to select relevant values.



# Working with Milestone Tracking

## How to Apply Custom Fields using Automations

Tip! Use custom processes to automatically populate the Custom Fields based on certain criteria being met, such as a Task is completed or an Email is sent.

- 1 Go to **Automations - Processes**.
- 2 Locate and **Edit** the Custom Process.

### 3 Example 1 - Work Commenced Date custom field automatically updates after email is sent

**Step 6: FYI Actions**  
**Create Email**  
 • An Email will be created from the 'FYI: Year End Queries' template  
 • Attachments will be Shared via Collaborate  
 • The document will be AutoFiled  
 • A task will be created with the subject "Complete this task once client info has been received"  
**Notes**  
 Task is Assigned to the Job Custom User Role: Accountant. Consider updating the Task Assignee to the appropriate User Role.

**Step 7: FYI Actions**  
**Update Job**  
 • State will be updated to In progress  
**Notes**  
 Confirm the **Job State** is set to the 'In Progress' option.  
 Confirm the **Work Commenced Date** Custom Field is set to the 'Current Date' option.

### 4 Example 2 - Job Reviewed custom field automatically updates after Complete job review task is complete

**Step 11: FYI Actions**  
**Create Task**  
 • A task will be created with the subject "Complete job rework"  
**Notes**  
 Task is Assigned to the Job Custom User Role: Accountant. Consider updating Task Assignee to appropriate User Role.

**Step 12: FYI Actions**  
**Update Job**  
 • State will be updated to Final Review  
**Notes**  
 Confirm the **Job State** is set to the 'Final Review' option.  
 Confirm the **Final Review Date** Custom Field is set to 'Current Date' option.

**Automation**  
 Processes: 1 History  
 job [X] Filter by Plan  
 FYI: Year End Compliance Job - Start to Finish  
 Automatically create the meetings, workpapers, emails and tasks required to complete annual compliance jobs, with job states and key dates automatically updated along the way.

**Step 7: Update Job**  
**Action**  
 Job: Current Job  
 Name: Unchanged  
 State: In progress  
 Category: Unchanged  
 Budget: Unchanged  
 Manager: Unchanged  
 Partner: Unchanged  
 Start Date: Unchanged  
 Due Date: Unchanged  
 Cabinet: Unchanged  
 Description: [Text Area]  
 Work Commenced: [[ "now" | date: "%Y-%m-%d" ]]  
 Set Custom Field: Select a custom field

**Step 12: Update Job**  
**Action**  
 Job: Current Job  
 Name: Unchanged  
 State: Final Review  
 Category: Unchanged  
 Budget: Unchanged  
 Manager: Unchanged  
 Partner: Unchanged  
 Start Date: Unchanged  
 Due Date: Unchanged  
 Cabinet: Unchanged  
 Description: [Text Area]  
 Job Reviewed: [[ "now" | date: "%Y-%m-%d" ]]  
 Set Custom Field: Select a custom field

Refer to the **Year End Compliance Job in the Automation Library**

Refer to the **Advanced Automations for Jobs Webinar to get started.**

## Monitoring & Reporting

- 1 Once these fields are set up, they're ready for use on all jobs and can be used in Jobs lists and custom views.
- 2 Export the list to excel for further reporting or filtering as required, for instance to do a turnaround calculation on 'work in' to 'work complete'.

You can also segment this to partners and managers to spot bottlenecks or process issues across teams.

**Jobs**  
 135 rows (refreshed 252 PM)  
 Sync  
 Save View  
 Reset View  
 CSV Export  
 Excel Report

Client	Name	State	Estimated	Actual	Variance	Information Request...	Work In	Work Commenced	Job Reviewed	Work Complete
K J & L G.A.	June Monthly Bookkeeping	In progress	2100	0200	1900	19 Jun 2023	26 Jun 2023	11 Jul 2023		
Jacobs Pa.	Annual Billing Job	In progress	3800	0530	3230	19 Jun 2023	26 Jun 2023	11 Jul 2023		
Stanley Sk.	Year end financial reports and tax returns	Waiting Client Info	1630	1130	0500	14 Jul 2023				
Marshall, F.	Individual Tax Return	Ready To Send	0100	0100	0000	12 Jun 2023	26 Jun 2023	29 Jun 2023	03 Jul 2023	18 Jul 2023
Marshall, L.	Individual Tax Return	Waiting Client Info	0300	0030	0230	14 Jul 2023				
Stanley Pa.	Annual Package Quarterly BAS	Waiting Client Info	0600	0100	0100	05 Jul 2023	26 Jun 2023	10 Jul 2023	18 Jul 2023	
K J & L G.A.	June BAS/MS/MSST	In progress	3100	0100	3400	19 Jun 2023	26 Jun 2023	11 Jul 2023		
Allyson, K.	Tax Planning	Planned	0600	0000	0600	24 Jul 2023				
Jacobs Eng.	Tax Planning	Planned	0600	0000	0600	14 Jul 2023				
Stanley M.	Fringe Benefits Tax	Ready To Send	0000	0000	0000	12 Jun 2023	26 Jun 2023	29 Jun 2023	03 Jul 2023	18 Jul 2023
Allyson, K.	Annual Financial Statements & Tax Return	Not Started	1500	0000	1500	14 Jul 2023				
Stanley Sk.	Income Tax Return	Planned	0300	0000	0300	07 Jul 2023				
Duncan, C.	Individual Tax Return	Planned	0100	0000	0100	07 Jul 2023				
Stanley Co.	Q2 Quarterly Return	Ready To Send	0800	0000	0800	12 Jun 2023	26 Jun 2023	29 Jun 2023	03 Jul 2023	18 Jul 2023

Customise job management and track milestones with ease.

For more information on Custom Fields, visit the FYI Help Centre at [support.fyi.app](https://support.fyi.app)