

Job Types in FYI

Info Guide



Elite Plan

Standard Jobs and Billing and Workflow Jobs for your practice

Set up Jobs to easily track and monitor job progress for your team, from within FYI.

- ✓ Overview of Standard, Billing and Workflow Jobs
- ✓ When to use Standard Jobs or Billing and Workflow Jobs in your Practice
- ✓ How to manage Workflow Jobs

	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

What is a Standard Job?

Standard jobs are used to **record time** and to **manage work** being completed for clients. For example, an Individual Tax job is used to monitor how the work is progressing and is also used to record time for billing purposes.

For a larger client such as a companies or trusts, you might deploy a job per work item. In this case the client would have a job for Year End Work and for a Quarterly Return, both jobs are used to record time for the relevant activities and to also monitor progress of work.

 Typically, this approach is taken where invoicing occurs for each item of work, rather than fixed fee i.e. an invoice is issued for Year End and a separate invoice is issued for Quarterly Return.

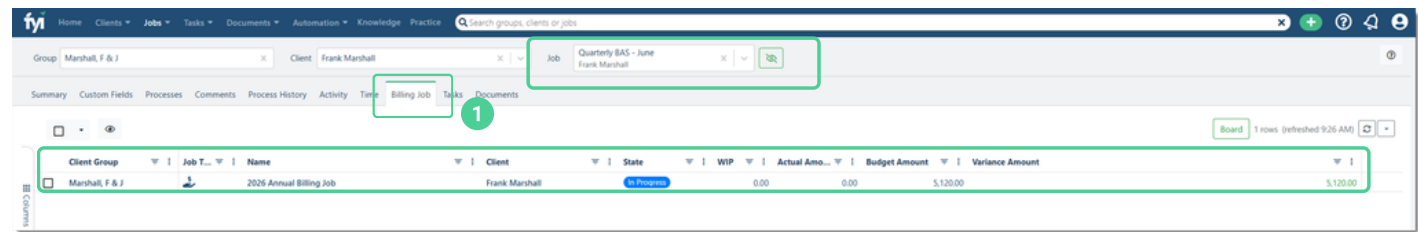
 This icon denotes the Job Type as a Standard Job in the Job Lists and in the Job - Summary tab

Client	Name	Job Number	State	Start date	Due date	Budget	Actual
Stanley Construction Ltd	Q1 Quarterly Return	303314429	In progress	23 Jun 2025	03 Jul 2026	1,200.00	00:00
Stanley Construction Ltd	Annual Financial Statements & Tax Return	303314426	In progress	23 Jun 2025	03 Jul 2026	1,200.00	00:00
Stanley Construction Ltd	Individual Tax Returns	303314427	Final Review	23 Jun 2025	03 Jul 2026	660.00	00:00

What is a Billing Job?

The Billing Job is the ‘main’ job and is used to roll up budget hours, budget amount and WIP from ‘sub-jobs’ to efficiently invoice clients under a fixed fee arrangement which incorporates different projects.

- 1 Billing Jobs appear in each linked Workflow Job Workspace for you to quickly navigate to, allowing for visibility of rolled up WIP.

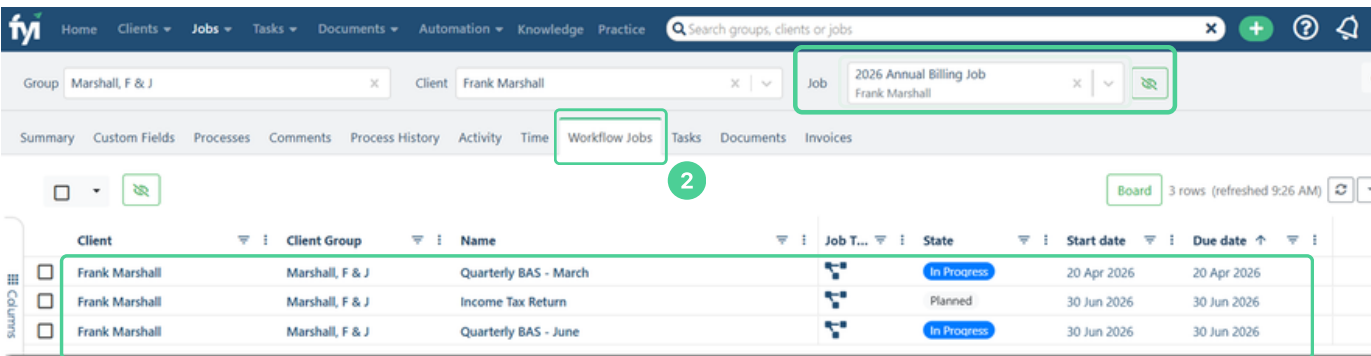


What is a Workflow Job?

These are ‘sub-jobs’ to Billing Jobs. Workflow Jobs are recommended for practices when work is not being invoiced separately, i.e. on a per job basis, and your preference is to have the time rolled up to a ‘main’ job (Billing Job) for fixed fee billing or WIP reporting purposes. Using Workflow Jobs allows visibility into the items of work that must be completed with their respective WIP, whilst maintaining ease of invoicing from a single Billing Job.

- 2 Workflow Jobs appear in the Billing Job Workspace for you to manage and assign to your team.

For example, for an Annual Billing Job, you might have ‘sub-jobs’ for Year End Financials, BAS/IAS/GST, and Bookkeeping. These are your Workflow Jobs.

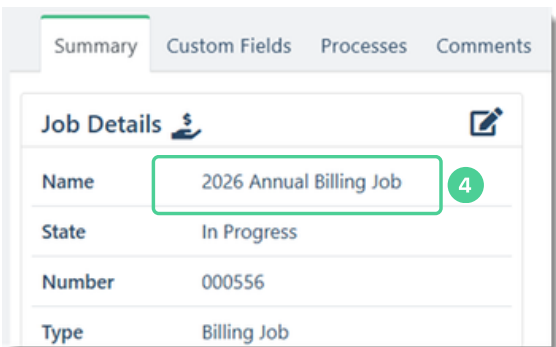
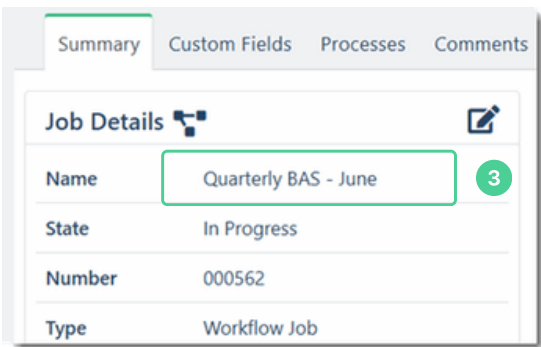


FYI provides flexibility to dictate when you use Standard Jobs or Billing and Workflow Jobs for any given project for your clients. This allows you to use all Job Types seamlessly when creating Jobs in FYI.

The choice of Job Type is largely dictated on how you will choose to invoice the job itself, whether it is a stand alone item of work you will invoice for, or if you wish to bill on a recurring basis for multiple items of work.

- 3 For management of work, use each Workflow Job. Navigate to workspace for the Workflow Job to review and update job details.
- 4 For management of work in progress, invoicing and job completion, use the Billing Job.

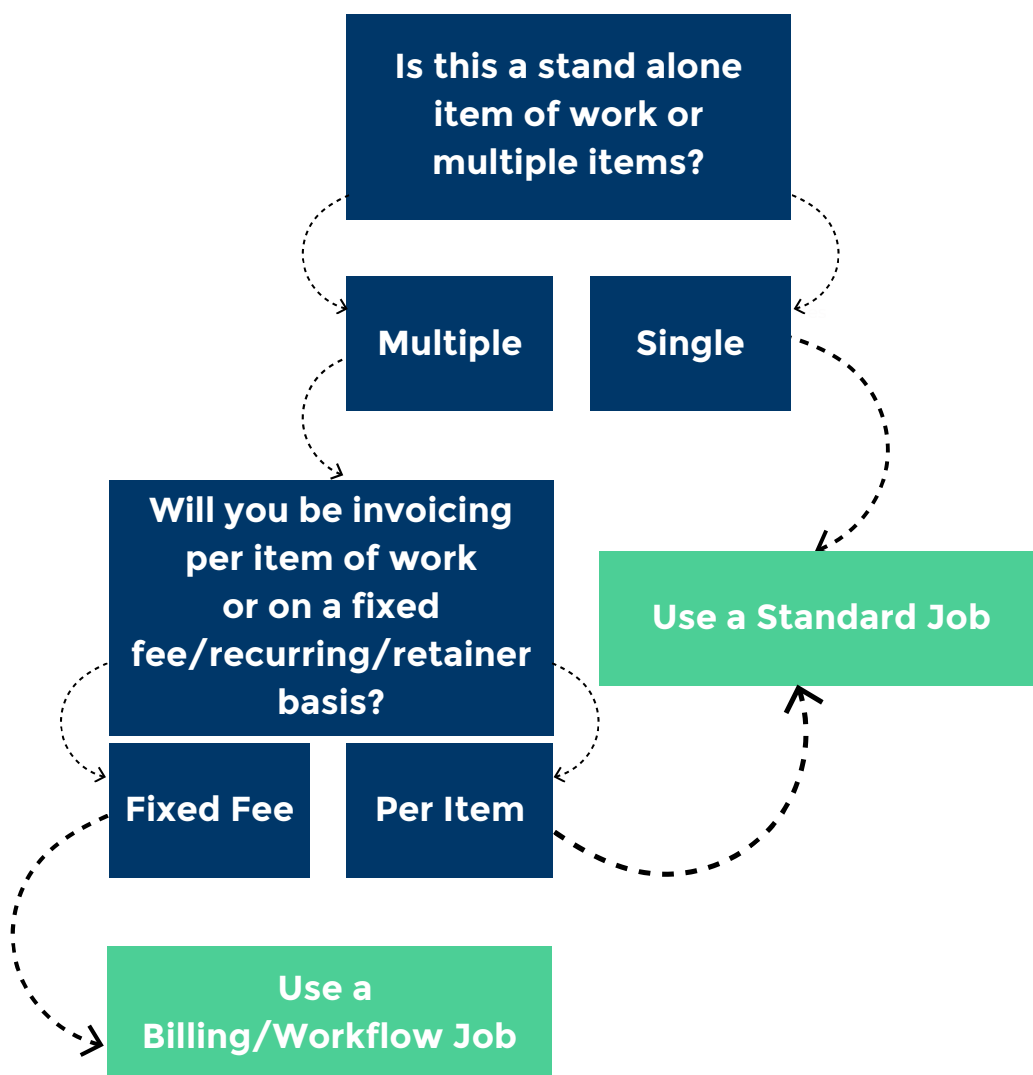
This job is complete when all workflow jobs are completed, and final invoice is raised.



When to use Standard or Billing Job?

Key Questions

The flowchart below represents some very high level questions to assist in your practice's decision of when to use each Job Type.



Identifying Job types in FYI

1 Billing Job Type

Summary	Custom Fields	Processes
Job Details  1		
Name	2026 Annual Billing Job	
State	In Progress	

2 Workflow Job Type

Summary	Custom Fields	Processes
Job Details  2		
Name	Quarterly BAS - June	
State	In Progress	

3 Standard Job Type

Summary	Custom Fields	Processes
Job Details  3		
Name	Individual tax return	
State	Planned	

How to manage Standard Jobs with FYI

To track progress of jobs we recommend filtering on Job Type of Standard and Workflow - this allows you to ensure work that is required by clients is completed.

Billing and Standard Jobs can also be filtered using the Job Type to manage invoicing requirements for your clients.

When all work has been completed for a Standard Job the final invoice should be raised and the job state updated to Completed.

1 Standard Job Created

Create the Standard Job in FYI and populate key job details and custom fields.

For more refer to [Creating Jobs from Job Templates](#).

2 Standard Job Completed

The Standard Job progresses through the Job States independently and is invoiced when required.

To manage WIP, Budget Hours and Budget Amount use the Financial Details section of the Standard Job.

For more refer to [Managing Work in Progress](#).

Once all work is complete, the Final Invoice is raised. The Job State is then set to "Completed" and the job is no longer visible on the Jobs Board or in Open Jobs lists.

Jobs						
All Search jobs						
Client	Name	Job Number	State	Due date	Job T...	
Frank Marshall	Quarterly BAS - June	000562	In Progress	30 Jun 2026		
Frank Marshall	2026 Annual Billing Job	000556	In Progress	30 Jun 2026		
Stanley Renovation Projects	Annual Compliance	000540	In Progress	30 Jun 2026		
Stanley, Mike	Annual Compliance	000548	In Progress	30 Jun 2026		
Stanley Landscaping	Annual Compliance	000539	In Progress	30 Jun 2026		
Stanley Construction Ltd	Annual Compliance Billing Job	000520	In Progress	30 Jun 2026		
Stanley, Mike	Annual Financials	000552	In Progress	30 Jun 2026		
Stanley Construction Ltd	Quarterly Return Billing Job	000190	In Progress	30 Jun 2026		
Stanley Renovation Projects	Stanley Renovation Projects - Income Tax Return	000545	In Progress	30 Jun 2026		
Stanley Family Retirement Fund	Tax Planning 2025	000554	In Progress	30 Jun 2026		

Create Job

Client

Duncan, Carol Elizabeth
carolduncan011@outlook.com

Job Type

Standard

Template

Annual Compliance - Individuals

Name

Individual tax return

State

Planned

Cabinet

No cabinet selected

Category

Compliance

Primary

Summary Custom Fields Processes Comments

Job Details

Name

Individual tax return

State

In Progress

Number

Planned

Type

In Progress

Template

Incomplete

Category

Pending Client Info

Cabinet

At Review

Start Date

On Hold

Due Date

Ready To Lodge

Manager

Ready To Send

Partner

01/07/2026

Manager

Mandy Jones

Partner

Olivia Williams

Financial Details

WIP

0.00

Budget Amount

180.00

Actual Amount

140.00

Write On/Off

-90.00

Budget Hours

1

Actual Hours

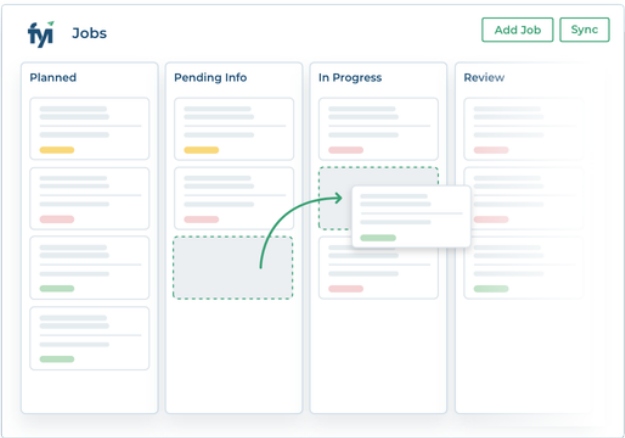
00:35

Time Rate

-

Description

Individual tax return preparation including filing.



How to manage Billing & Workflow Jobs with FYI

To track progress of jobs we recommend filtering on Job Type of Workflow and Standard - this allows you to ensure work that is required by clients is completed.

Billing & Standard Jobs can also be filtered using the Job Type to manage invoicing requirements for your clients.

When all Workflow jobs for a Billing job have been completed the final invoice should be raised and the Billing job completed. Similarly for a Standard job.

1 Billing Job Created

Create the Billing Job in FYI and populate key job details and custom fields.

For more refer to [Creating Jobs from Job Templates](#).

2 Workflow Jobs Created

Create the Workflow Job in FYI, link the Workflow Job to the Billing Job and populate key job details and custom fields.

Note: If there are Workflow Job Templates linked to a Billing Job Template the Workflow Jobs will automatically be created and linked to the Billing Job.

For more refer to [Creating Jobs from Job Templates](#).

3 Workflow Jobs Completed

Each Workflow Job progresses through the Job States independently and is invoiced when required from the Billing Job.

Once all Workflow Jobs are completed, the final invoice is raised.

4 Billing Job Completed

To manage WIP, Buget Hours and Budget Amount use the Billing Job. The Financial Details displays the total budget hours and budget amount and WIP from each linked Workflow Job, rolled up to the Billing Job. You can also view these details on each Workflow Job.

For more refer to [Managing Work in Progress](#).

Once the Final Invoice has been completed the Job State is set to "Completed" and the job is no longer visible on the Jobs Board or in Open Jobs lists.

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All Search jobs						
Client	Name	Job Number	State	Due date	Job T...	
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Stanley Renovation Projects	Stanley Renovation Projects - Income Tax Return	000545	In Progress	30 Jun 2026		
Stanley Family Retirement Fund	Tax Planning 2025	000554	In Progress	30 Jun 2026		

Create Job

Client

Allport, K J and L G
AllportLandLG@email.com

Job Type

Billing

Template

Annual Billing Job

Name

Annual Compliance

State

Planned

Create Job

Client

Allport, K J and L G
AllportLandLG@email.com

Job Type

Workflow

Template

Quarterly BAS

Name

BAS Preparation

State

Planned

Billing Job

Annual Compliance

Cabinet

No cabinet selected

Category

Compliance

Primary

Job Type	Client	Name	State
☐	K J & L G Allport	Annual Financial Statements & Tax Return ...	Completed
☐	K J & L G Allport	BAS Preparation & Lodgement - June	Completed
☐	K J & L G Allport	Bookkeeping - June Bookkeeping	Completed

Summary Custom Fields Processes

Job Details

Name

Annual Compliance

State

Completed

Number

J007317

Type

Billing

Financial Details

WIP

1,226.67

Budget Amount

930.00

Actual Amount

1,226.67

Write On/Off

0.00

Budget Hours

4

Actual Hours

03:50

Time Rate

-

Description

Get the most out of Jobs and easily track and monitor your workflow without leaving FYI.

For more information on Jobs in FYI, visit the Help Centre at [support.fyi.app](#)