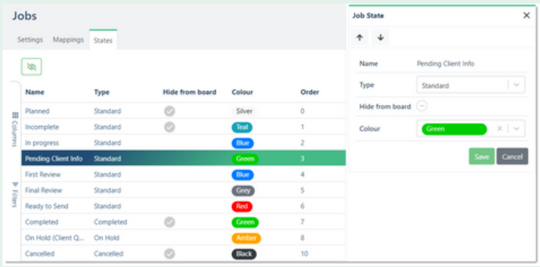
5-Point Plan for Managing Jobs

Best Practice Guide

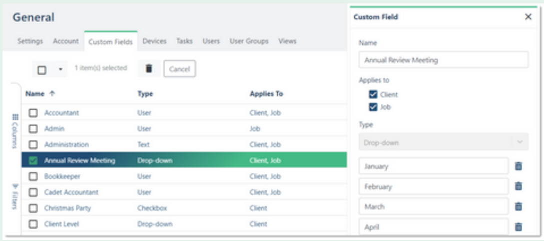
Review and map your job states

Update Job States in Practice Settings to ensure they are ordered correctly and display in the correct sequence for your team.



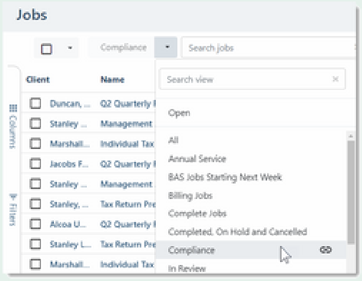
Review Job Templates, Categories & Custom Fields

Review your job settings in your Practice Management software including any new or existing custom fields to help you manage jobs for your practice such as office, user roles or key milestone dates.



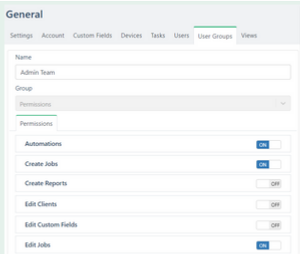
Create custom views for easy job management

Determine the job lists you need quick access to and set these up as custom views. For example, jobs per office, per category or grouped views to aide workflow management meetings with the team.



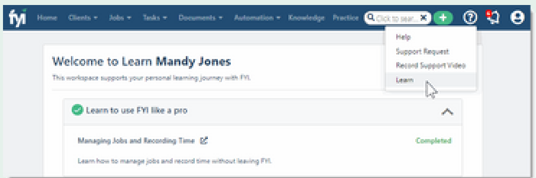
Update any user permissions as required

Determine if any team members require additional permissions to edit jobs and custom fields and update User Groups if required.



Complete the Learn Course

Ensure everyone in the team completes the Jobs & Time Learn course and set expectations on the management of jobs internally to establish a single source of truth and real time visibility into jobs moving forward for your practice.



Follow our 5-point plan to achieve #maximumefficiency with job management for your practice. Ready to take it to the next level? Consider automations to handle the administrative side of job management. Check out our Automations Library to get started.

For more information on Jobs & Time, visit the FYI Help Centre