Jobs

Best Practice Guide

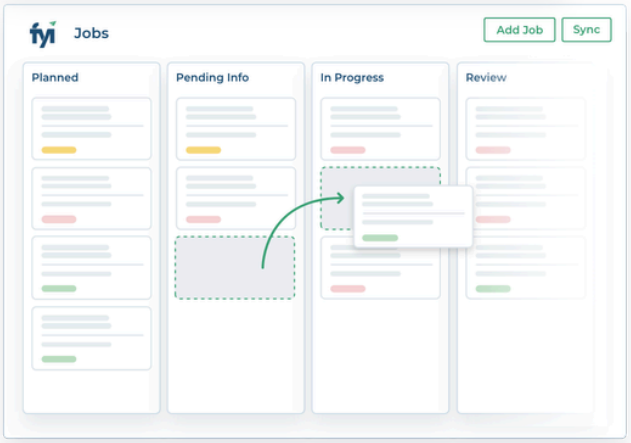
Pro Plan | Intermediate Plan

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:

1. Review how your jobs display in FYI. Check which states are visible on the **Jobs Board**.
   Learn more about Managing Job States
2. 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.

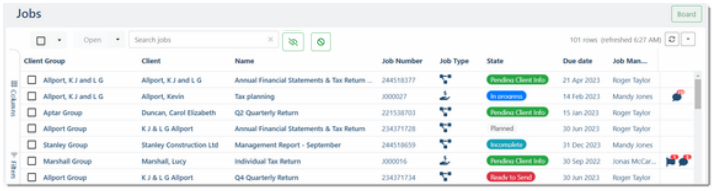
Working with Jobs in FYI

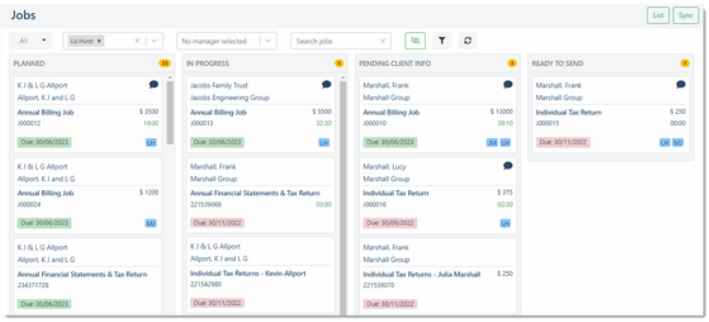
Jobs workspace

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.

Pro Plan





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
- State
- Budget
- Start Date & Due Date
- Partner & Manager
- Custom Fields
- User Roles.

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

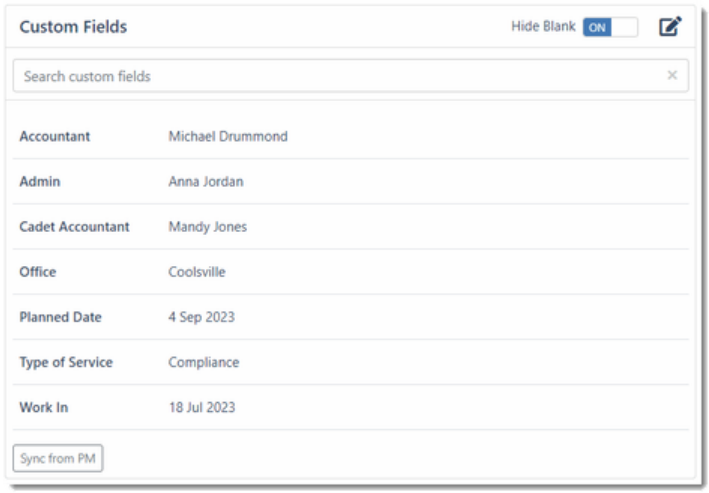
Custom fields can be created by an FYI Admin, and edited by those with appropriate permissions.

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.



Working with Jobs in FYI

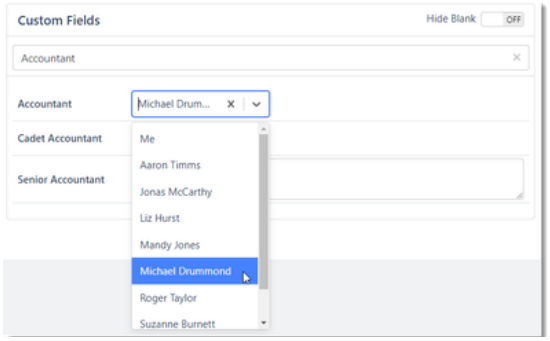
User roles on jobs

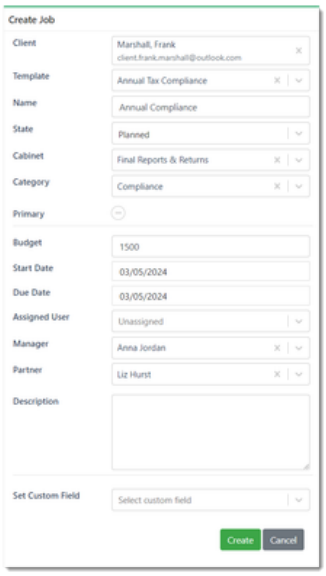
Assign key people to jobs with **User Roles** such as Accountant, Reviewer and Bookkeeper.

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

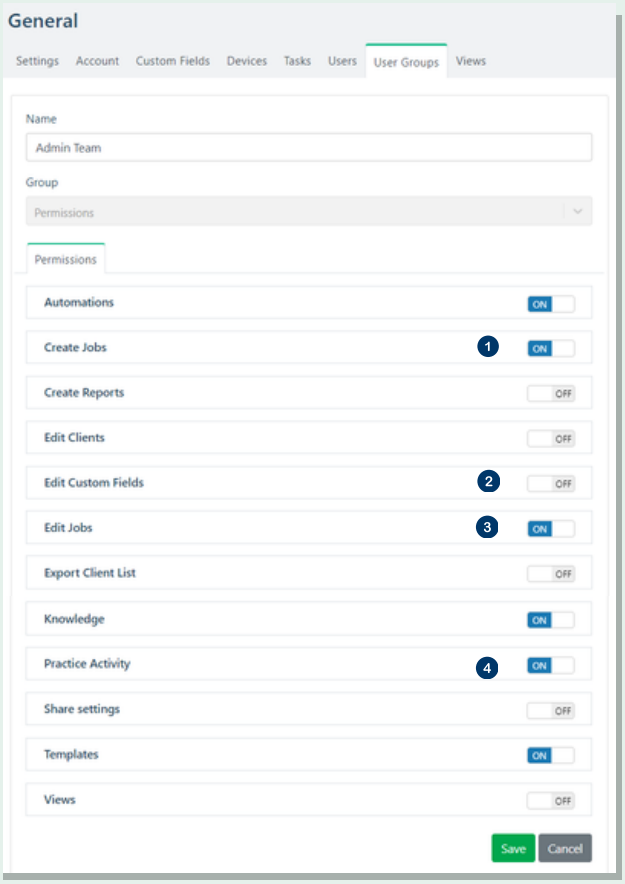
Learn more about creating jobs as an Automation step

Permissions for Jobs

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

1. **Create Jobs** - create Jobs in FYI that are synced to XPM
2. Edit Custom Fields - allows users to edit custom fields in the Jobs Workspace - Custom Fields tab
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



Best Practice for Standard Jobs

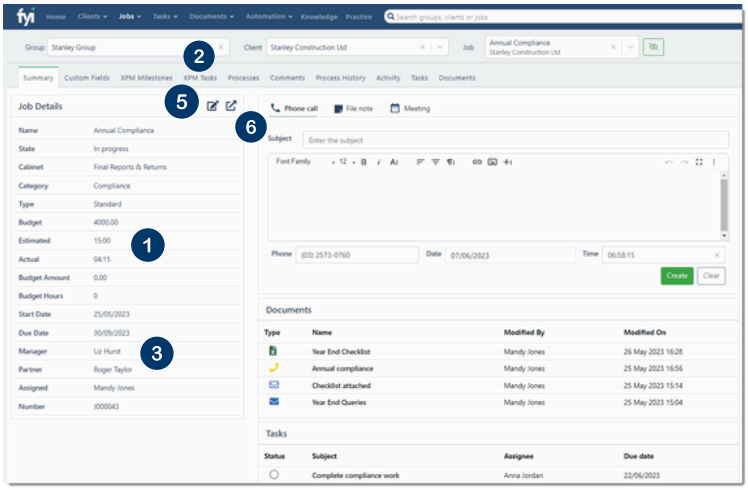
Overview

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.



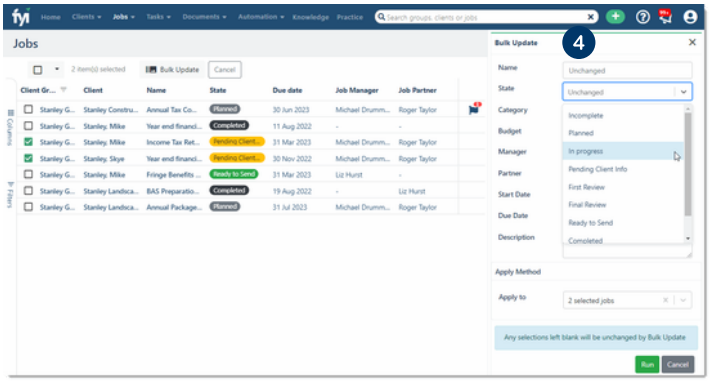
What this means in FYI

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.

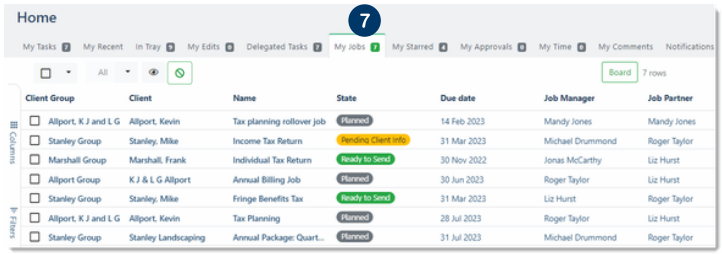
2. The job's XPM tasks will appear in the **XPM Tasks** tab for each Job.
3. **User roles** are available and will sync back to XPM as a custom field.

What this means for your team



4. All users will be able to update job states from the job drawer, job summary list, job list using bulk update or by dragging the job in the Jobs Board.
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'



7. All jobs, despite the selected view, appearing in your **My Jobs** tab in your **Home Workspace** are active jobs you have been assigned to in the job schedule in XPM.

Best Practice for XPM Workflow Jobs

Overview

Using Xero's fixed fee best practice

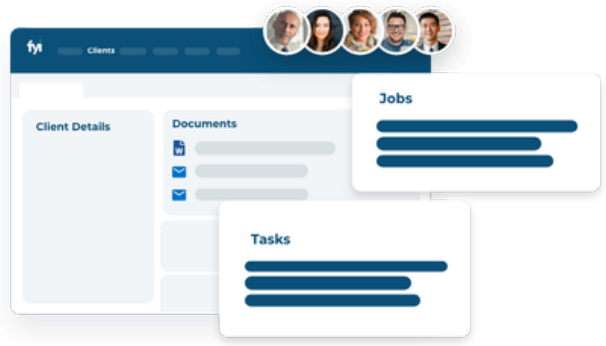
We recommend Workflow Jobs for practices using an Annual Billing Job set up in XPM who want to monitor and track their XPM tasks.

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!

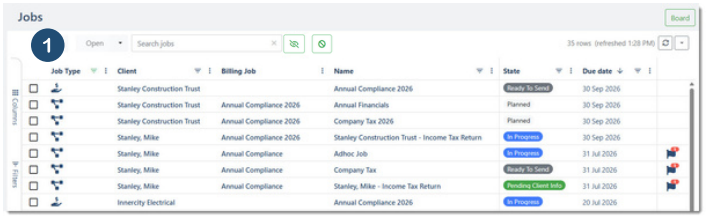


What this means in FYI

1. Display and maintain both XPM Jobs & XPM Tasks in FYI. They will be separated into two distinct **job types**:

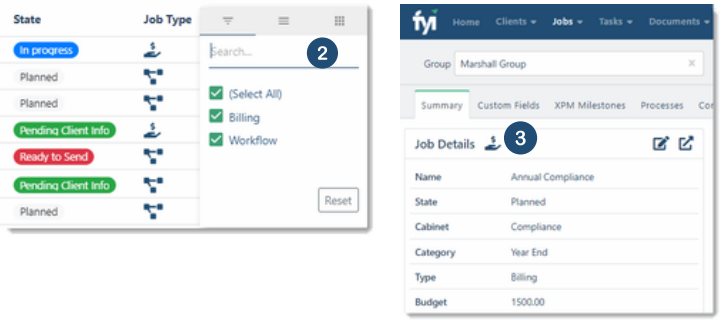
   Billing Jobs - these are XPM Jobs

   Workflow Jobs - these are XPM Tasks



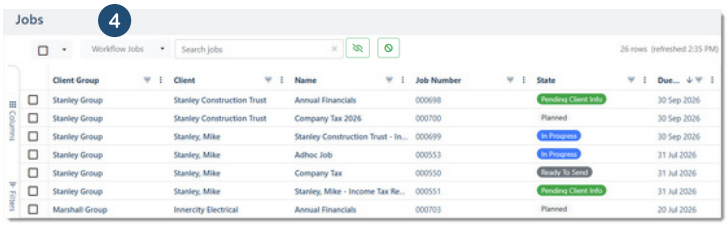
2. Practices are able to include **Job Type** into views and filter as needed to simplify views and lists.

3. Easily recognise the type of job in the **Summary tab** in the Job Workspace.



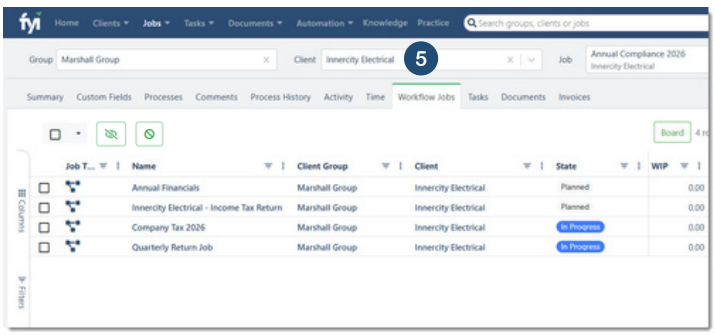
4. You can filter on workflow jobs only for your accounting & bookkeeping teams, a particular job name for your admin team and have a dedicated view for billing jobs for your management team.

   The depth of how you can **customise your views** means there's a solution for everyone!



5. 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.

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 unless the dates have been scheduled in the XPM Task.

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

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
- Cancelled jobs are hidden from job lists and views by default. Click the **Show cancelled jobs** (block) icon in the toolbar to display them
- 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

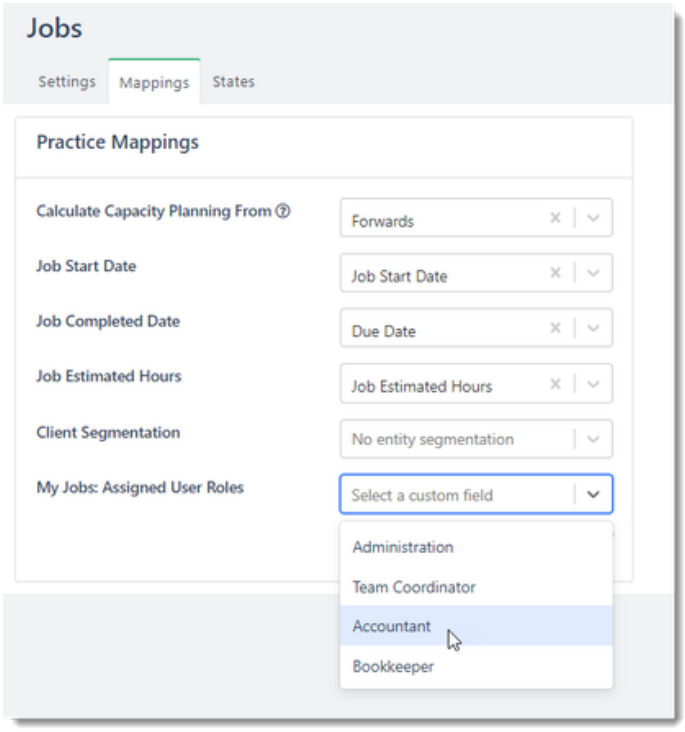
It is recommended for practices to adopt **Assigned User Roles feature for workflow jobs**. This allows practices to assign active users to roles in the job, such as accountant or bookkeeper, as a way to allocate the workflow job to team members.

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.



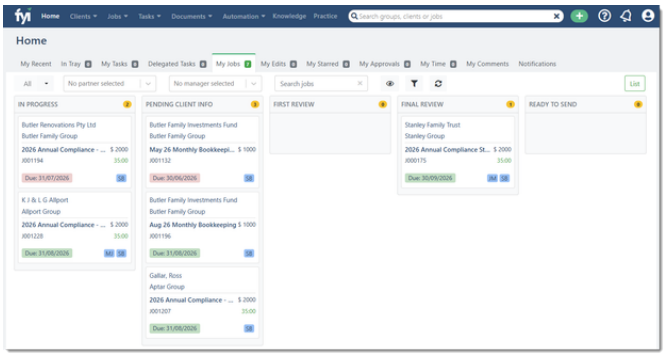
Best Practice for XPM Workflow Jobs

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.

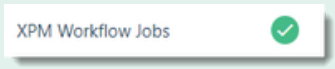


Enabling XPM Workflow Jobs

1. 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.

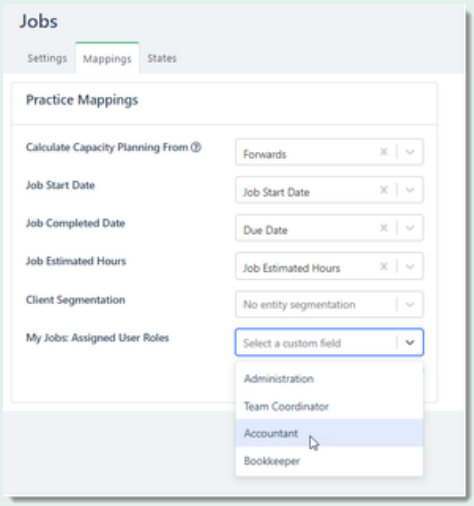


3. Set up the User Roles mapping in **Practice Settings - Jobs - Mappings**.

   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



Important notes

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

Manage jobs and record time the easy way.

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