

# Housekeeping your Platform

## Best Practice Guide



### Ensure all Draft Filed documents are Filed

Review your Draft Filed document view. Ensure the team file documents from their InTray before office closure.

For team members taking extended leave, ensure they share their InTray with another team member, more [here](#).

**Tip:** Set auto-reminders for your team with this [Automation](#).

Name	Client Group	Client	Cabinet	Year
Scan Q2300921	-	-	Correspondence	2024
Financial Statements	-	-	Correspondence	2024
Scan Q2300921	-	-	Correspondence	2024
Business Information	-	-	Correspondence	2024
Dylan has awesome shorts	-	-	Correspondence	2024
Scan Q2300921	-	-	Correspondence	2024
Financial Statements	-	-	Correspondence	2024
Business Information	-	-	Correspondence	2024
Rtr: Tax Return	-	-	Correspondence	2024
Rtr: Tax Return	-	-	Correspondence	2024
Private & Confidential	-	-	Correspondence	2023

### Update Filing Defaults & Review Permissions

Add new option for the Year Category if required, details [here](#).

Review Practice Filing defaults, update if required repeat for Client and User Filing defaults, more [here](#).

Review User Group assignments and permissions, update if required, more [here](#).

**Email Autofile**  
Automatically import emails and attachments directly into FYI from Outlook.

Settings Exclusion Defaults

Default filing for document creation, in the absence of client defaults

Cabinet: Correspondence

Year: 2026

Work Type: Select Work Type

### Review & Reassign Tasks and/or Jobs

For team members taking extended leave, consider reassigning Tasks and Jobs if appropriate.

**Tip:** Filter by Task Assignee or User Roles to Bulk Update to a new team member.

**Tasks** | 10 items selected | Delete | Bulk Update

Status	Subject
<input type="checkbox"/>	Please complete overdue budget note for 2025 Individuals
<input type="checkbox"/>	Please complete overdue budget note for 2025 Individuals
<input type="checkbox"/>	Please complete overdue budget note
<input type="checkbox"/>	Complete file note
<input type="checkbox"/>	New Annual Compliance Form has been Submitted
<input type="checkbox"/>	BAS ready for invoicing
<input type="checkbox"/>	Prepare for E-Signature
<input type="checkbox"/>	WSP Review and Write off
<input type="checkbox"/>	refer to docs
<input type="checkbox"/>	BAS ready for invoicing

**Bulk Update**

Assignee: No assignee selected

Cabinet: No cabinet selected

Start date: Date

Due date: Date

Status: No task status selected

Apply Method

Apply to: 10 selected tasks

Any selections left blank will be unchanged by Bulk Update

Run Cancel

### Review Active Scheduled Automations

Review your Automations, especially any scheduled that may need to be deactivated for the interim.

This is also a good opportunity to archive any processes no longer in use.

**Tip:** Filter by Status and Trigger to refine the list of automations.

App	Name	Trigger	Filter	Status
	Add 'Signed' to end of signed documents for Annotation	Schedule	Document - View Filters ...	Active
	ASIC Register Prepare + Send	Schedule	Document - View Filters ...	Active
	AutoArchive Financial Plan	Schedule	Document - View Filters ...	Active
	Document Approval	Schedule	Document - View Filters ...	Active
	Email Tracer	Schedule	Document - View Filters ...	Active
	EDFY Party Planning	Schedule	Client entity, it is left, Cr...	Active
	FYI Client Signed Notification	Schedule	Document - View Filters ...	Active
	FYI Client Signed Notification	Schedule	Document - View Filters ...	Active

Set your platform up for success in the new year.  
For more resources, visit the FYI Help Centre at [support.fyi.app](https://support.fyi.app)