

Auto-Delete Documents



About this automation:

Automatically move Archived documents that were created in your preferred time frame to Deleted State and View.

Note: This process does not permanently delete the document, the documents can be recovered from the Deleted document view.



Simply import the sample automation, customise to suit your practice, test and activate!

The screenshot shows a 'Documents' table with columns for Type, Name, and Client. Two documents are listed: 'New Business Financials' and 'Engagement Letter', both associated with 'Marshall, Julia Loui'. A 'Bulk Update' modal is open, showing fields for Client, Cabinet, Filing, Owner, and Workflow Status, all with 'No [category] selected' or similar. The 'Delete' checkbox is checked with a green tick.

What's included:

- ✓ Automation Process Steps

FYI: Auto-Delete Documents
Automatically delete archived documents based on their created date.

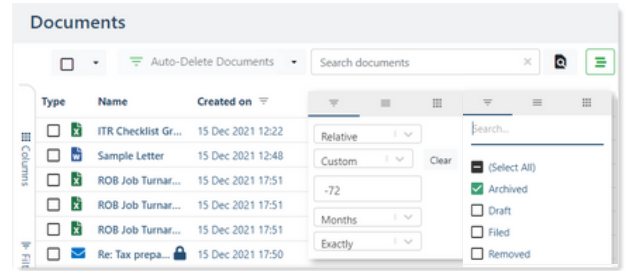
The screenshot shows the configuration details for the 'FYI: Auto-Delete Documents' automation. It includes fields for Name, Description, Trigger (Schedule: Every day from 13 Sep 2024), Filter (Document - View Filters: Auto-Delete Documents), Owner (Liz Hurst), Start From (13/09/2024), and Inherit Job. It also shows the last and next run times. At the bottom, a table lists the automation steps:

Step	Application	Action
1	FYI Actions	Alter Document • Trigger Document will be filed as "[TriggerDocumentFileName] - DELETED" in the cabinet

How to import:

Before you begin, ensure your View has been saved in **Documents** with the following filters:

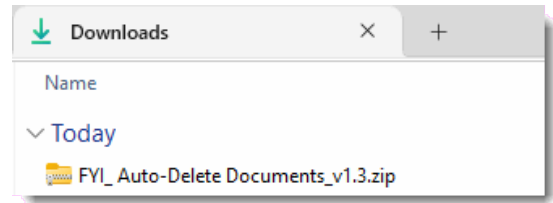
- "Auto-Delete" View
- Created Date** = Relative Filter, Custom: -72 months exactly
- Filing Status** = Archived



Step 1 - Save the import file locally

The first step is to download the zip file provided in FYI's help centre.

Simply save the file locally, for example, in your Windows Explorer Downloads folder. You **do not** need to extract the files.

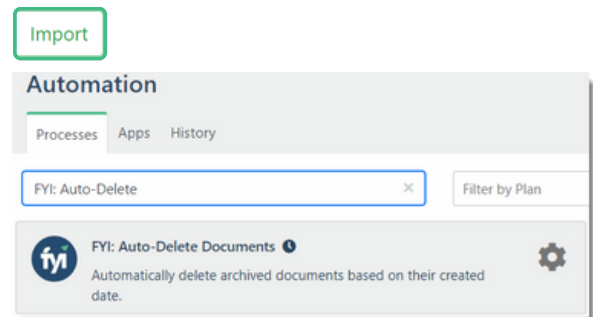


Step 2 - Import the files into FYI

Navigate to the **Automations** screen and click the **Import** button on the right-hand side of the screen.

Locate and select your saved "Auto-Delete Documents" file and click **Open** to import the automation.

You can also drag and drop the zip file to the Automation list view. The Process will be imported into FYI.



Step 3 - Review the process

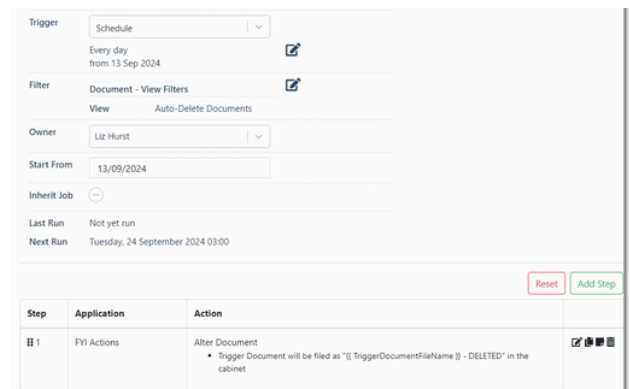
Processes are imported with the **Status** set to Draft.

You can locate the process by searching for "FYI" in the "Search processes" field.

This process uses the **Auto-Delete** View which is the custom view you created in the Documents workspace.

- Review the schedule
- Review the process owner
- Review the **process step "Alter Document"**, more details [here](#).

Note: This process also appends 'DELETED' to the document name.



Step 4 - Test and activate

Click the **Test** button to display a list of documents.

Search and select a specific document to run the test for and select **Run Test**.

Go to the Document Workspace and change your view to the **Deleted** document view and review the altered document.

When ready, set the **Status** to Active:

- This automation is set to run automatically every day from the commencement date.
- This automation will run once per document only.

