

Purge Response Data

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Overview

With FormAssembly Enterprise, you can set FormAssembly to purge (i.e., permanently delete) response data. You can configure how often you would like a purge to run using the settings discussed below.

Please note, in cases where you select data to be immediately purged, **FormAssembly runs purges every 10 minutes**. Please [contact support](#) if you have any questions or concerns.

Caution: Deletion is permanent and cannot be undone. Set this option only if you have strict requirements regarding data retention.

Please Note: Data purges will run every 10 minutes. We do not have an option to delete immediately.

Requirements

Enterprise

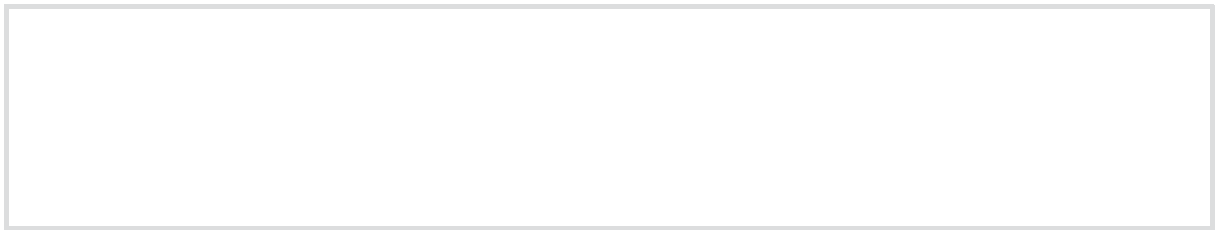
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Data Retention Settings

To enable the Purge options:

1. Go to **Admin Dashboard > Settings > Data Retention**
2. Select **ON** to enable the automatic purge of collected responses on a custom schedule. **OFF** means data is never purged.



Once enabled, you may choose from three options to purge response data:

- [Number of days](#) after the response was submitted
- At the [field level](#)
- After [successful Salesforce Connector](#) processing

Once enabled, the purge will clear all responses that exceed the retention period; including responses submitted before setting was turned on.

Purge after a Number of Days

This is a global setting which applies to all forms in your Enterprise instance.

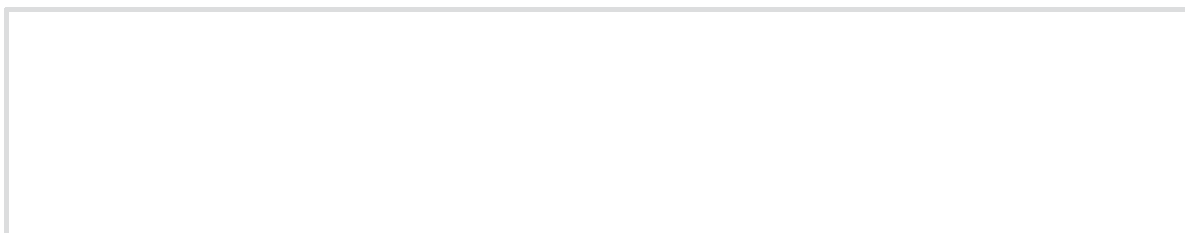
Once the [Data Retention Settings](#) are enabled, enter the number of days after which completed responses are to be deleted, then click **Apply** at the bottom of the page. Leave empty if you have more selective purge requirements.



Purge at the Field Level

The field-level purge allows you to delete sensitive data that is no longer needed. Only the fields you choose will be purged. The rest of the response will remain intact. This option is on a form-by-form basis.

1. Once the [Data Retention Settings](#) are enabled, enable the option to **Allow field-level purge**. Then click **Apply** at the bottom of the page.



2. To configure a specific form, go to **Admin Dashboard > Forms > All Forms**. Find the form you want to configure.
3. Click **Configure** under the Purge column.
4. Under the Field Purge settings, choose the field to be purged, and click **Add**.

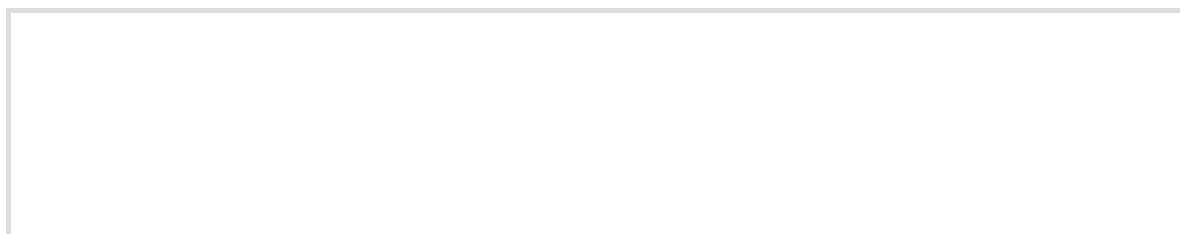
5. Choose the minimum time you'd like the field data to remain in FormAssembly. Please note, **FormAssembly runs purges every 10 minutes.**
6. Click **Save.**



To remove a field from the purge list, uncheck its box. For details on completed purges, visit the **Purge Log.**

Purge after Successful Salesforce Connector Processing

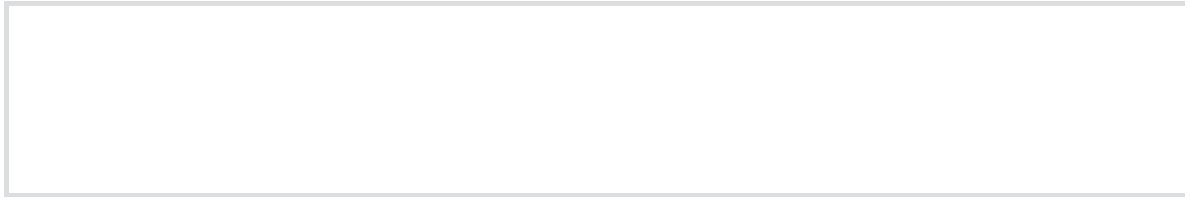
1. Once the [Data Retention Settings](#) are enabled, enable the option to **Allow purge after successful connector execution.** Then click **Apply** at the bottom of the page.



2. To configure a specific form, go to the Salesforce Connector configuration page for that form.
3. Scroll to the bottom of the page, and check the box for **Purge response from FormAssembly when this connector executes**

successfully. Data will then be purged shortly and at frequent intervals.

4. Select the step of the connector which must successfully process in order for the form's response data to be deleted.



Note: You may choose more than one step. As long as one of the steps processes successfully, the response data will be deleted every 10 minutes. If you are using any skip-if formulas, a "skip" does not count as a success for purging purposes.

5. Save the connector.

NOTE: Parent steps that provide an error will stop the connector from completing successfully. Child steps that show an error will continue to process as normal and will not stop the connector from a successful completion thus meaning the data will still be purged. Only if a parent step errors will the purge stop.

E-Signature Records and Data Purging

If you are using the [E-Signature feature](#) in conjunction with FormAssembly's data purging, there are several additional notes to consider.

If you set your purge settings to delete entire response records, the response will be purged but there will be a separate copy of the signed data that will not be purged. This is because E-Signature records must be retained indefinitely.

Your form respondent will still have access to the signed data in initial email they received.

If you have not purged the entire response, you will still have access to the signed data in the response view. If you have purged the entire response, you will need to contact the support team to retrieve that data.

Purge Logs

Finally, you can view the logs for data that has been purged by navigating to your **Admin Dashboard → Logs → Purge Logs**. Here, you will be able to view the logs for data that has been purged based on your settings from above.

FAQs

Do you purge log entries?

Log entries for responses are **not purged**. Only form response data is purged.

What happens to responses that don't successfully execute?

Complete responses that are not purged after connector execution, will eventually be purged by the global purge.

If you would like to avoid this scenario, you should make sure the Salesforce Connector is running on the submit step of the connector timeline. This will force the response to stay incomplete.

Can a form purge after successful connector execution and on a daily

schedule for those responses that do not successfully complete?

When you set both the global purge **and** connector-level purge, if the response goes through the connector successfully, it will be purged right away.

If the response does not get purged automatically after connector execution, then the response will be purged the next time the global purge runs.

Purges will **never** include incomplete responses. Incomplete responses are never purged. This is because you would not want to lose response data if the respondent has not finished their submission; you always want it to be available for them to complete later.

Is data purged if I turn "on" the custom data retention policy but have not defined or changed any sub-policies?

No data will be purged if you have not defined or changed any sub-policies.

Can users without admin access enable field-level purges?

Yes. Users without admin access can enable field-level purges for forms that they own, so long as the admin has enabled the field-level purge for their user role.

Can response-level and field-level purges be used together?

Yes. Response-level and field-level purges can be used together. You can both purge at the field level as responses come in and purge entire responses on a schedule.
