

Data Retention - Purge Settings and Logs

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In this Article

- [Overview](#)
- [Requirements](#)
- [Purge Settings](#)
- [Purge Completed Form Responses](#)
- [Purge at the Field-Level](#)
- [Purge After Successful Salesforce Connector Processing](#)
- [E-Signature Records and Data Purging](#)
- [Purge Logs](#)
- [FAQs](#)

Related Articles

Overview

With Team plans and higher, you can set FormAssembly to purge (i.e., permanently delete) response data, settings, and logs for forms and workflows in your instance. 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: Purge is permanent and cannot be undone. Set this option only if you have strict requirements regarding data retention.

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

Requirements

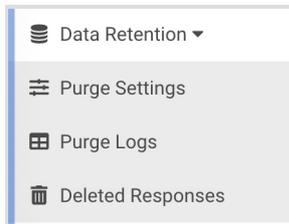
To access and configure purge settings a FormAssembly user account must

- be part of a Team Plan or higher
 - have Administration Permission granted
 - specifically, the setting "Can manage purge settings and logs" must be enabled
-

Purge Settings

To enable the Purge options for forms and/or Workflows:

1. Select your user account dropdown from the top of the page, and select **Admin Dashboard**
2. Select the **Data Retention** dropdown from the left panel



3. Select **Purge Settings**
4. Select the tab for **FORM PURGE SETTINGS** or **WORKFLOW PURGE SETTINGS**
5. Select **ON** to enable the automatic purge of collected responses on a custom schedule. **OFF** means data is never purged.

Data Retention

As an admin you have the ability to establish purge settings for your entire organization. Purged data is permanently deleted and cannot be undone. [Learn more about purging response data.](#)

FORM PURGE SETTINGS | WORKFLOW PURGE SETTINGS

CUSTOM FORM DATA RETENTION POLICY

ON - Enable purging form responses or response fields on a custom schedule (set below)
 OFF - Disable purging

⚠ Purged data is permanently deleted and cannot be undone

PURGE ALL COMPLETED FORM RESPONSES ⓘ

ON - Automatically purge form responses on a custom schedule (set below)
 OFF - Never purge collected form responses

Automatically purge form responses after they are completed.

ALLOW FIELD-LEVEL PURGE ⓘ

YES
 NO

⚠ Configure Field-Level purge on the All Forms page

ALLOW PURGE AFTER SUCCESSFUL CONNECTOR EXECUTION ⓘ

YES
 NO

⚠ Configure this setting on a Connector Setup page

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

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

Purge Completed Form Responses

This is a global setting that applies to **all** forms in your FormAssembly Instance. Set this to **ON** and enter the number of days, months, or years after which completed responses are to be deleted. Set this to **OFF** if you have more selective purge requirements. Click **Apply** at the bottom of the page to confirm your choice.

PURGE ALL COMPLETED FORM RESPONSES ⓘ

ON - Automatically purge form responses on a custom schedule (set below)

OFF - Never purge collected form responses

Automatically purge form responses after they are completed.

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

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 Purge options are enabled, enable the option to **ALLOW FIELD-LEVEL PURGE**. Then click **Apply** at the bottom of the page.

ALLOW FIELD-LEVEL PURGE ⓘ

YES

NO

⚠ Configure Field-Level purge on the All Forms page

2. To configure a specific Form, go to **Admin Dashboard > Forms > All Forms**.
3. Find the form you want to configure.
4. Click the **vertical ellipsis** next to the Last Edited Date column and select **Purge Settings**.

All Forms							
<input type="text" value="Search"/>							
STATUS	FORM ID	FORM NAME	FORM OWNER	RESPONSE COUNT	ACTIVE CONNECTORS	CONNECTOR ERRORS	LAST EDITED DATE
	1875	<input type="text"/>	<input type="text"/>	0	0	0	11/10/2023 3:37 AM
	1874	<input type="text"/>	<input type="text"/>	1 (1 unread)	0	0	
	1873	<input type="text"/>	<input type="text"/>	1 (1 unread)	0	0	
	1872	<input type="text"/>	<input type="text"/>	0	2	0	

- Edit as User
- Edit Properties
- Purge Settings
- View Form

5. Under the Field Purge settings, choose the field to be purged, and click **Add**.
6. Choose the minimum time for the field data to remain in FormAssembly. Please note, **FormAssembly runs purges every 10 minutes**.
7. 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 Purge options are enabled, enable the option to **ALLOW PURGE AFTER SUCCESSFUL CONNECTOR EXECUTION**. Then click **Apply** at the bottom of the page.

ALLOW PURGE AFTER SUCCESSFUL CONNECTOR EXECUTION ⓘ

YES

NO

Configure this setting on a Connector Setup 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 for the form's response data to be deleted.

Data Retention Option

FormAssembly will keep a copy of the data submitted to Salesforce unless you choose to purge responses automatically.

Purge response from FormAssembly when this connector executes successfully.

(This does not affect data in Salesforce.)

Note: You may choose more than one step. As long as one step 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 completing successfully. **The data will still be purged.** Only if a parent step errors will the purge stop.

E-Signature Records and Data Purging

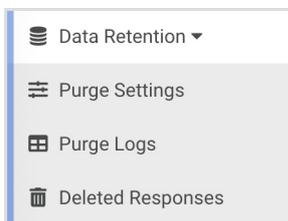
If you are using the [E-Signature feature](#) in conjunction with FormAssembly's data purging, there are several additional notes to consider.

- 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's respondents will still have access to the signed data in the 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

To view the logs for data that has been purged:

- Select your user account dropdown from the top of the page, and select **Admin Dashboard**
- Select the **Data Retention** dropdown from the left panel



- Select **Purge Logs**
- Select the tab for **FORM PURGE LOGS** or **WORKFLOW PURGE LOGS**

Here, you will be able to view the logs for data that has been purged based on your purge settings.

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 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?

Data will **not** 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.
