

Client Purge Tool

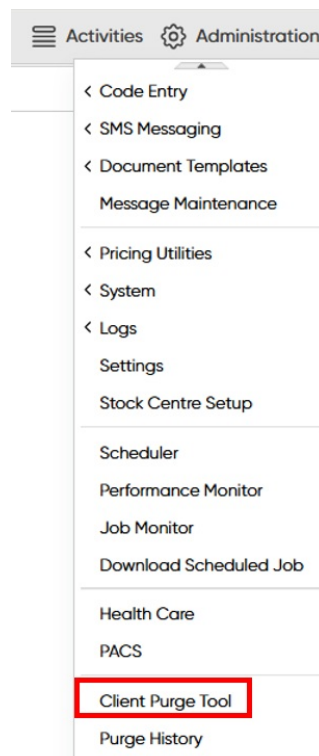
21/07/2025 11:44 am BST

Summary

The 'Client Purge Tool' is an administrative tool assisting practices with [GDPR compliance](#). It is used to remove personal client data from your Practice Management System which you have no requirement to hold.

Details

The 'Client Purge Tool' can be located under the 'Administration' menu.





Once selected, the Client Purge Tool wizard will appear.


Client Purge Tool


Client Purge Criteria


Specify Purge Criteria:


Client Site: 


☒ Consent Period Expiry Date Before: 


☒ Last Visit Date Before: 

☒ Last Account Activity Before: 

☒ Last Patient Reminder Date Before: 

☒ Last Compliance Reminder Date Before: 

☒ Last Appointment Date Before: 

☒ Registration Date Before: 

Or tick below to purge Specific Client:

☐ ContactID:

Client Purge Criteria >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion

Next

Cancel

Using the Client Purge Tool Wizard

1) Client Purge Criteria

Specify which clients you wish to purge using the criteria filters provided:

Client Site = Clients registered site.

Consent Period Expiry Date Before = Data Consent Expiry Date.

Last Visit Date Before = Clients last visit date (based on the last payment/appointment/treatment date)

Last Account Activity Before = Filters by the last date activity occurred on in the clients accounts.

Last Patient Reminder Date Before = Filters by the last date patient reminder due date for a patient under the clients account.

Last Compliance Reminder Date Before = Filters by the last entry due date for compliance reminders on patients under the clients account.

Last Appointment Date Before = Filters by the last appointment date for the client.

Registration Date Before = Filters when client was registered. When selected, any clients registered after the chosen date will not be deleted.

At least two of the criteria need to be specified in order to proceed. Filtering by 'Client Site' is Mandatory.

Specific Client Option

If you wish to Purge a single client's data, enter their ContactID into the field provided and select 'Next' to proceed.

Or tick below to purge Specific Client:

☒ ContactID:

Client Purge Criteria >> Outstanding Balances >> Purge Exceptions >> Partial Purge >> Full Purge >> Completion

Select the 'Next' button to proceed to the next section.

2) Outstanding Balances

Clients with an outstanding balance will be exempt from the data purge. A list of these clients will be displayed which can be printed for reference if required.

Client Purge Tool

Outstanding Balances

The following Clients cannot be purged as they have an outstanding balance:

ContactId	Consent Date	Client Name	Balance
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Select the 'Next' button to proceed to the next section.

3) Purge Exceptions

A list of clients that have been registered as exempt from a Data Purge are displayed. Again, these can be printed for your reference if required.

Client Purge Tool

Purge Exceptions

The following Clients cannot be purged as they have purge exception reasons:

ContactId	Consent Date	Client Name	Exception Reason
1217723	23/06/2021	Mr/Mrs C Donald	Ongoing Case

See [Registering a Client](#) for information on how to add an exception to the clients record.

Select the 'Next' button to proceed to the next section.

4) Partial Purge

This screen displays all clients who have patients that have received treatment within the last 5 years.

These clients can only be partially purged as their data is required for legal purposes.

The following data is deleted as part of a 'Partial Purge':

Partial Purge

Client Details

First Name

Surname

Address Details

SMS/Email Communication Logs

VetXML Communication

Client Documents

Client Notes & Pop-Up Notes

Phone Number(s)

Email Address(es)

✗

✗

✗

✓

✓

✓

✓

✓

✓

Patient Details

Name

Patient Details

Patient Location

Appointment Details (Location & Notes)

Treatment & Archive Treatment History

Patient Documents

Patient Notes

✗

✗

✗

✗

✗

✗

✗

Close

Select the 'Next' button to proceed to the next section.

5) Full Purge

This screen displays a list of clients who will have their data fully purged.

Client Purge Tool

Full Purge

The following Clients registered patients have no treatment recorded within the last 5 years. Therefore their data will be fully purged.

Cont...	Cons...	Client Name	Name/No	Address1	Address2	City	PostCode
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The following data is deleted as part of a "Full Purge".

Full Purge [X]

Client Details		Patient Details	
First Name	✓	Name	✗
Surname	✓	Patient Details	✗
Address Details	✓	Patient Location	✓
SMS/Email Communication Logs	✓	Appointment Details (Location & Notes)	✓
VetXML Communication	✓	Treatment & Archive Treatment History	✗
Client Documents	✓	Patient Documents	✓
Client Notes & Pop-Up Notes	✓	Patient Notes	✗
Phone Number(s)	✓		


[Close]

Select the 'Next' button to proceed to the next section.

6) Completion

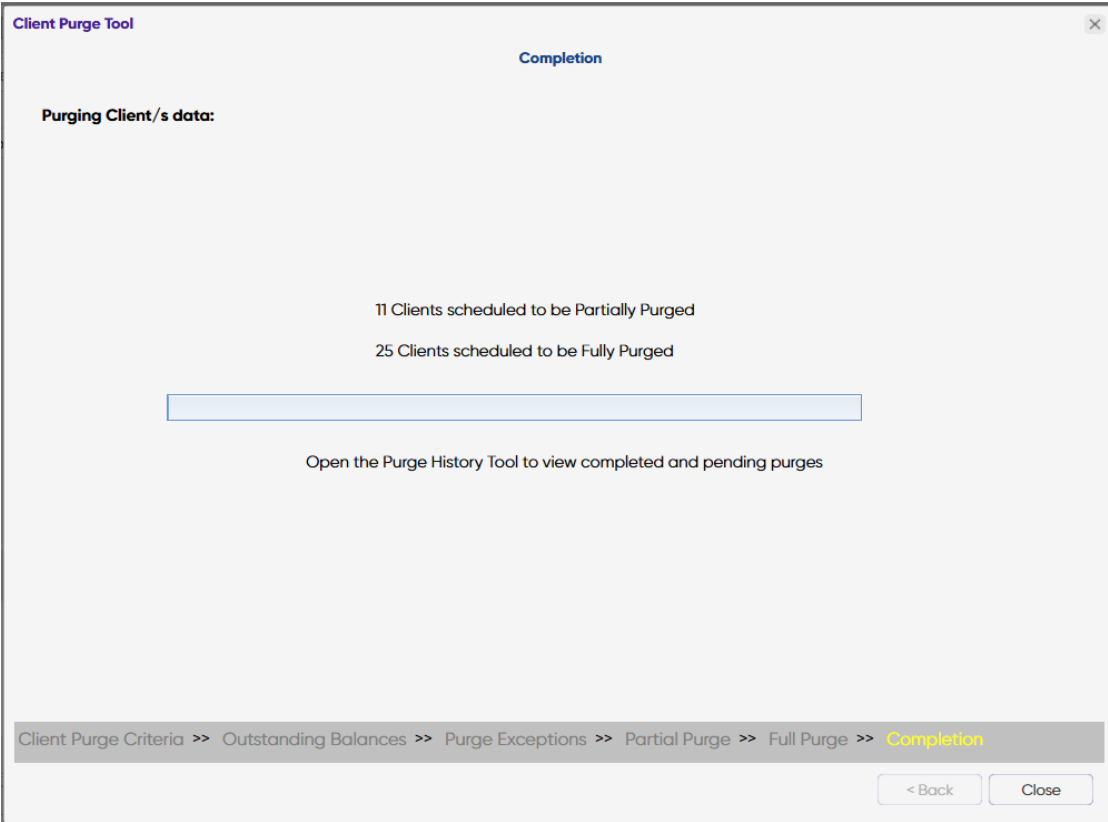
Selecting 'Next' will bring up the following confirmation message. Select 'Yes' to continue.

Client Purge

 Are you sure you want to continue with the purging of Client data?

[Yes] [No]

The clients will then be scheduled for a partial or full purge as specified.



Client Purges are scheduled tasks that run out of working hours.

Client Purge History

To view a log of Client Purges, navigate to Administration > Purge History.

This screen allows you to view each Purge Run and which clients were purged partially and fully.

Client Purge History				
Purge RunId	Purge Date	Purge Criteria	User Name	Status
23	11/07/2025	ClientSiteId=1101,User=Jupiter,ConsentPeriodExpiryDate=Jul 11 2022,Lc	Jupiter	PENDING
22	02/12/2024	ClientSiteId=1101,User=jupiter,ConsentPeriodExpiryDate=Dec 02 2021,I	jupiter	Purged
21	02/12/2024	ClientSiteId=1101,User=jupiter,ConsentPeriodExpiryDate=Dec 02 2021,I	jupiter	Purged

If a purge status is showing as pending, it is possible for you to delete the purge and stop the process.