

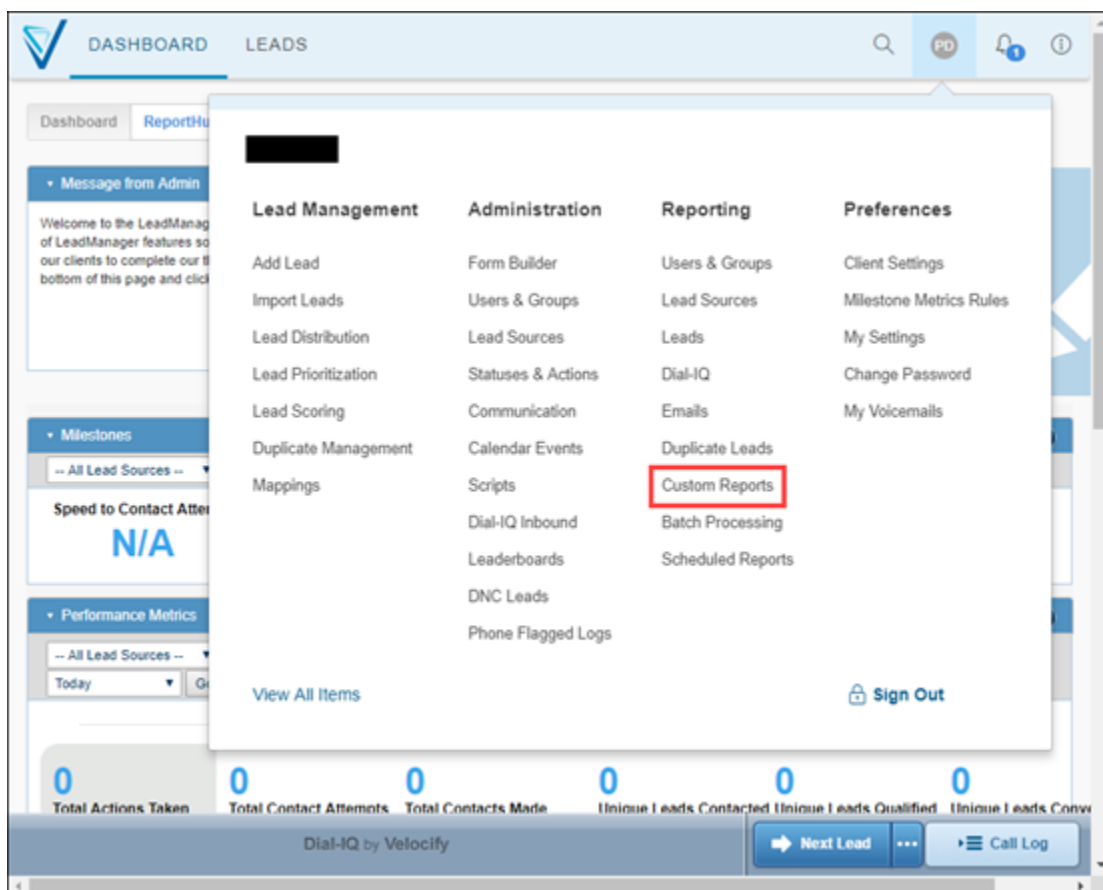
HOW TO IDENTIFY AND DELETE DATA FIELDS

Create a Report of Data You Want to Delete

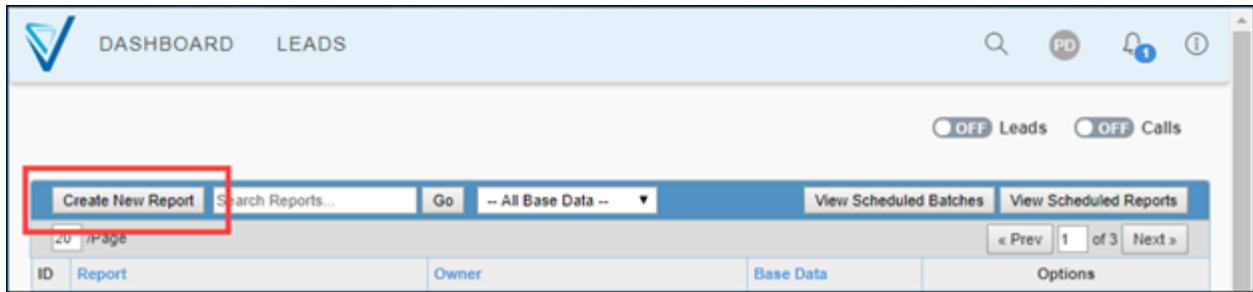
Click your name on the upper right of the header to access the Menu options

Under **Reporting**, click **Custom Reports**.

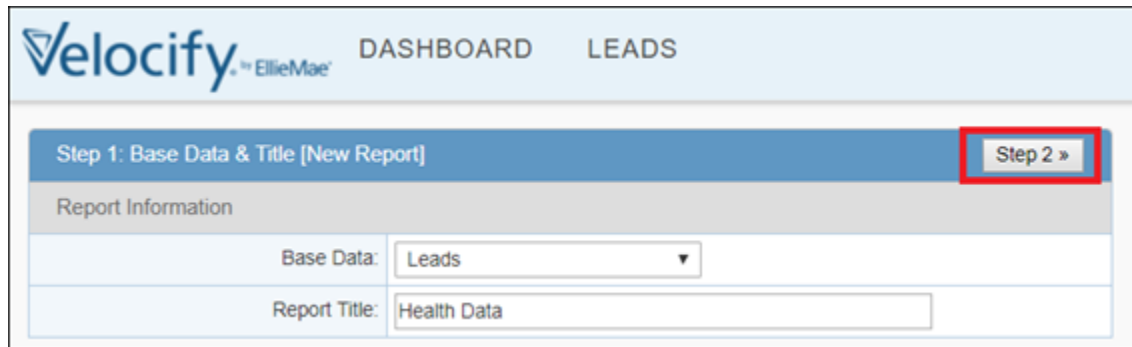
NOTE: If **Custom Reports** is not displayed, or if you experience issues while creating a report, contact Velocify Support at support@velocify.com.



Click the **Create New Report** button on the top left of the page.

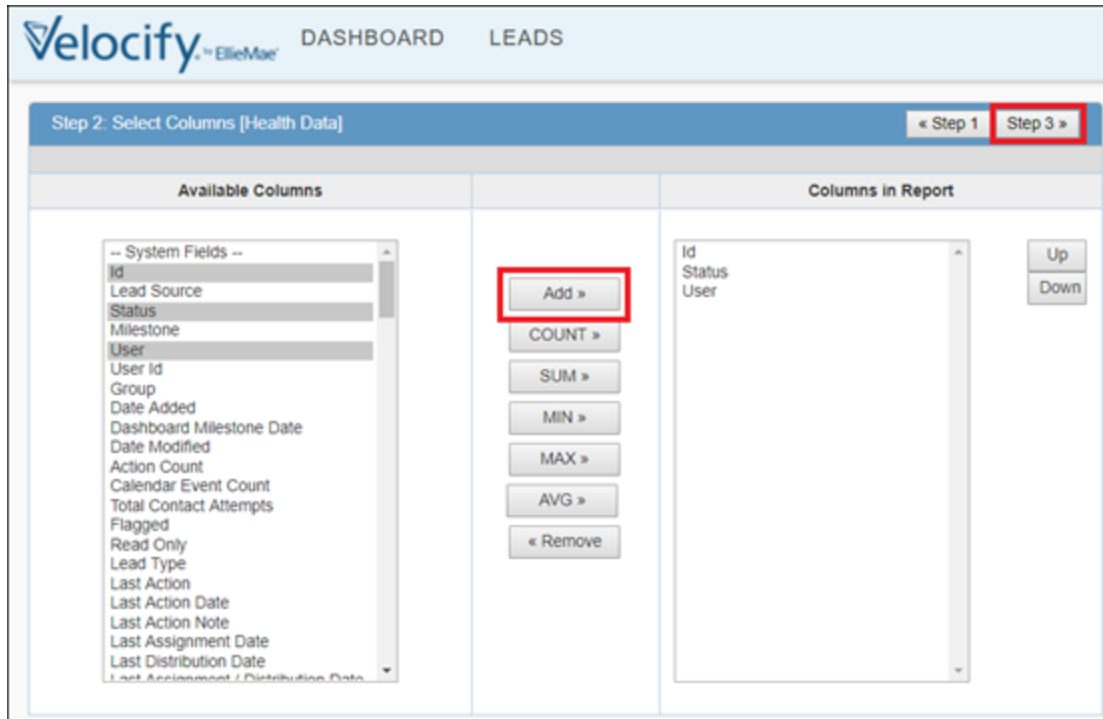


On the *Step 1: Base Data* page:



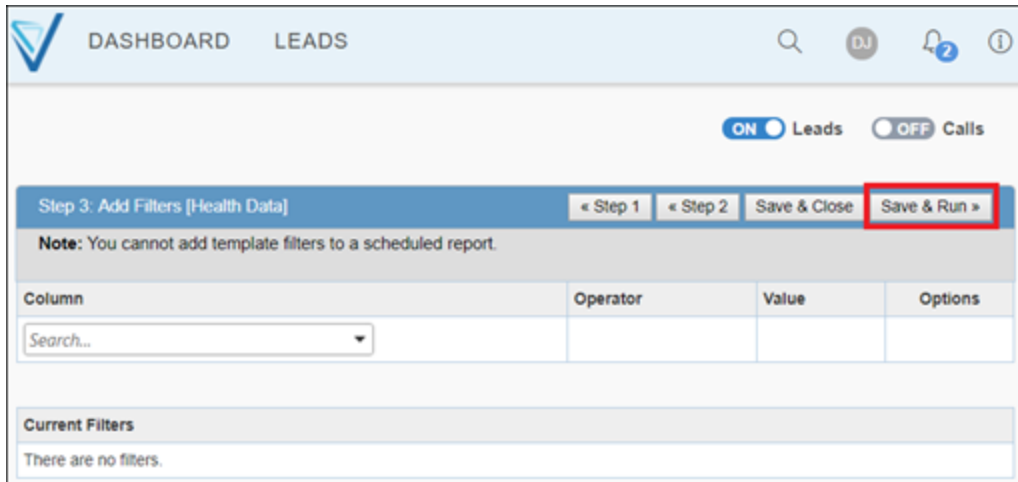
- Base Data: The default value is **Leads**. You do not need to make any updates.
- Report Title: Type the name of your report.
- Click the **Step 2** button on the top right corner of the page.

Use the options in the *Step 2: Select Columns* page to select potential fields to be deleted:



- For example, if you want to create a report on health data, Columns should include all fields that may contain health data. For more information, see [Protected Health Information \(PHI\) Data Fields](#).
- From the *Available Columns* section, select one or more fields and then click the **Add To** select multiple fields, press the **Ctrl** button on your keyboard and then select the fields.
- Click the **Step 3** button on the top right.

On the *Step 3: Add Filters* page, click the **Save and Run** button.

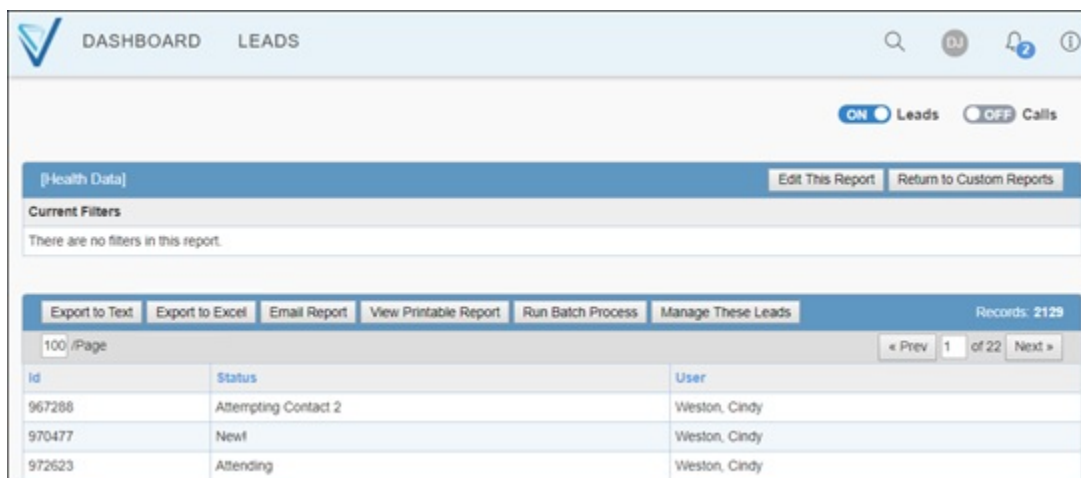


NOTE: If you receive a time-out error you will need to add a **Date added** filter to the report and break up the report into smaller quantities.

For more information on how to add filters to a custom report, see [LeadManager: Custom Reports: Detailed Review](#).

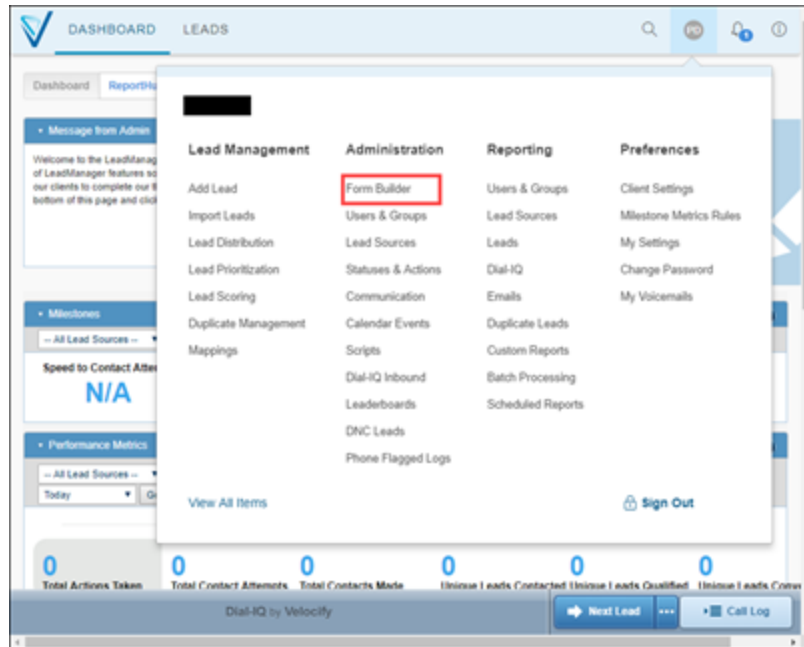
You can also contact Velocify Support at support@velocify.com.

Review the generated report to identify fields to be deleted.



Manually Delete Data Fields

Click your name on the upper right of the header to access the Menu options. Under **Administration**, click **Form Builder**.



Find the fields you want to delete, based on the Custom Report you created.

NOTE: You can use *Ctrl+F* and type the field names into the search box to locate the fields.

Click the **Delete** link corresponding to the fields you want to remove.

↑↓	<input type="text"/> Promo Code	Text	Optional	Yes	No	Yes	Edit Delete
↑↓	<input type="checkbox"/> Check box Check Check	Checkbox	Optional	Yes	No	Yes	Edit Delete
↑↓	<input type="text"/> TEST 2	Text	Optional	Yes	Yes	Yes	Edit Delete
↑↓	<input type="text"/> Test 3	Text	Optional	Yes	Yes	Yes	Edit Delete

NOTE: If the **Delete** link is greyed out, contact Velocify Support at support@velocify.com.

In the Confirmation window, click **Yes**.

NOTE: Deleting a field removes all data within that field and may impact workflow associated with the field. This process is permanent and cannot be undone.

If you would like to export the data first, please see [How To Identify And Export Data Fields](#)

- [PHI-find-fields-delete.pdf](#) (400 KB)