How to Configure Default Retention Periods for Case Types

Max Mazo - 2025-11-03 - Comments (0) - Forms, Precedents and Templates

How to Configure Default Retention Periods for Case Types

Default retention periods ensure compliance and consistent data management across your matters. By setting a default retention period per case type, all new matters which are created under that type will automatically inherit the specified retention duration, which is what streamlines the administrative process.

Prerequisites

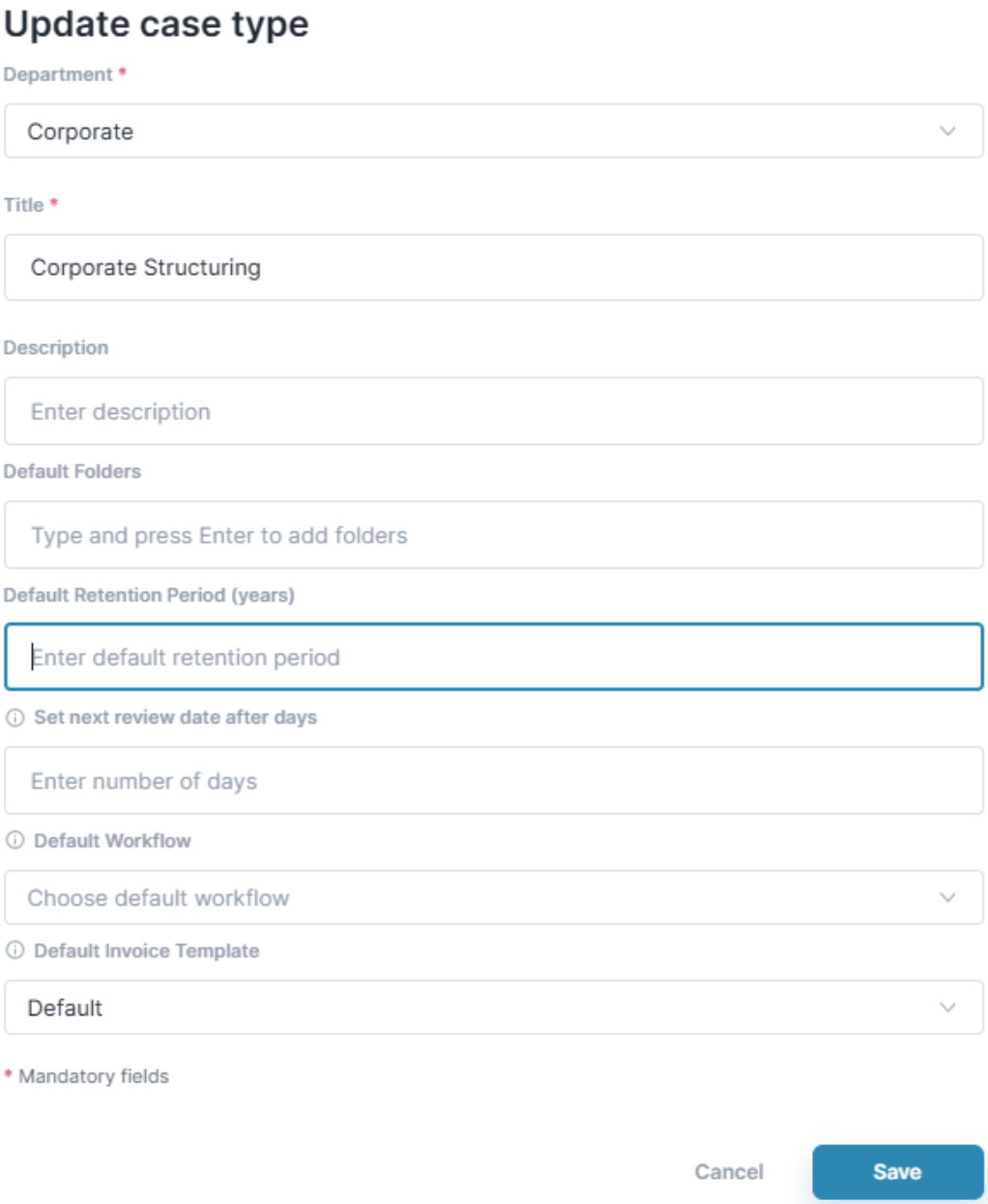
- You must be an **Admin** user to access the **Configuration** area and modify case types.
- **Important:** Any change to the default retention period will **only** apply to matters which are created **after** the change has been made. It will not affect existing matters.

Updating Default Retention Period

The same steps apply for the retention periods when creating a new case type instead of steps 4,5 and 6.

1. Navigate to the Configuration tab, which is the cog icon, on the left-hand menu.
2. On the navigation bar at the top of the screen, click the **Organisation** tab.
3. Click the Case Types sub-tab which appears underneath **Organisation**.
4. Locate the case type which you wish to edit, either by using the search field or by filtering by department on the right-hand side.
5. On the far right of the relevant case type's row, click the **ellipsis menu** (**...**).
6. From the drop-down menu, select Edit.

- The 'Update case type' modal window will appear.



1. Scroll down to the **Default Retention Period (years)** field.

2. Enter a numerical number into the field to represent the number of years the retention period should be (e.g., enter 7 for a seven-year retention period).

3. Click the **Save** button at the bottom of the modal window. The case type will be updated, and a confirmation message will appear on the top right.