

Choose how long each kind of record is kept

Updated 14 October 2026 · unforged.ai/help/folio/choose-how-long-each-kind-of-record-is-kept

A retention class says how long one kind of record is kept and what happens when that time is up. You might have one for client files and another for payroll, each with its own period.

Before you start

You need permission to manage Folio settings. An admin in your organisation can give it to you.

1 Open Retention classes

Go to **Settings** in Folio, choose **Retention classes** and click **New class**, or **Edit** next to one you have.

2 Name it and set the period

Give it a **Name** people will recognise, such as "Client files". In **Kept for**, enter a number and choose years, months or days, or choose no end date. **Counts from** sets when that time starts, usually the **Filing date**.

3 Choose how it's protected

Under **Protection**, **Retained** lets two administrators delete a record early with a reason. **Locked** means no one can delete it before its date, and needs the add-on.

4 Choose storage and what happens at the end

Pick a **Storage** option for how quickly the records need to open. Under **At the end**, choose **Ask us first**, or **Delete after notice** and the number of days' notice you'd like.

5 Say why and save

Choose a reason, add a few words, and click **Add class** or **Save**. To use it for new filings unless someone picks another, click **Make it the default**.

Changes that need a second administrator

A change that keeps records for less time or protects them less, such as switching from Locked to Retained or giving less notice, says so before you save. The button changes to **Send for approval**, and nothing changes until a second administrator approves it in **Approvals**.

Archive storage

Records in **Archive** or **Deep archive** cost less to keep, but they have to be restored before anyone can open them, which takes time.