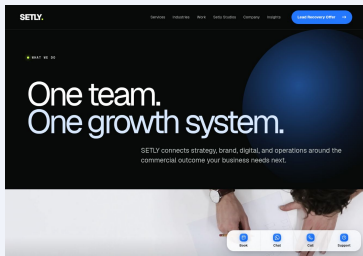


Chat data-minimization worksheet

Collect only what is needed to help a visitor.



FROM THE SETLY PROJECT LIBRARY

A real project screenshot for visual inspiration. Follow the written steps for your own business.

YOUR ACTION PLAN

- 1 List each requested field and explain why it is necessary.
- 2 Avoid asking for passwords, payment details or unnecessary sensitive information in chat.
- 3 Define who can access transcripts and how long they are retained.
- 4 Review the platform's actual storage and deletion settings before launch.

EXAMPLE - ILLUSTRATIVE

An initial enquiry can ask for a preferred reply method without requesting identity documents.

CHECK YOUR RESULT

Can any field be removed without preventing the next action?

Chat data-minimization worksheet

Use the prompts below to make this resource specific to your business. Save a local copy after completing it. Keep passwords and private customer data out of this worksheet.

Field:**Purpose:****Required or optional:****Transcript access:****Retention decision:****Deletion process:****DONE WHEN**

Can any field be removed without preventing the next action?

FURTHER READING

[HighLevel Support](#)

Independent Setly planning resource. Platform settings and requirements can change; use the linked official help for current configuration details.