Requesting to delete data

As part of the GDPR it is required that persons can ask to have stored personal data deleted at any time. This request can be handled in more ways either by phone, email, by form on a website or by a landing page using webCRM landing pages. By phone, email and form on website the request does not include webCRM configuration other than deleting the requested personal data in the system and documenting the deletion.

Deleting persons or organisations are done by clicking the red cross on the specific entity in webCRM. Note that deleting an organisation deletes all attached entities e.g. persons, activities, opportunities/deliveries, support cases etc. Deletion is non-reversible, but webCRM administers can access a delete log showing all deleted entities at **Configuration → Main settings → Status and logs → Delete log**.

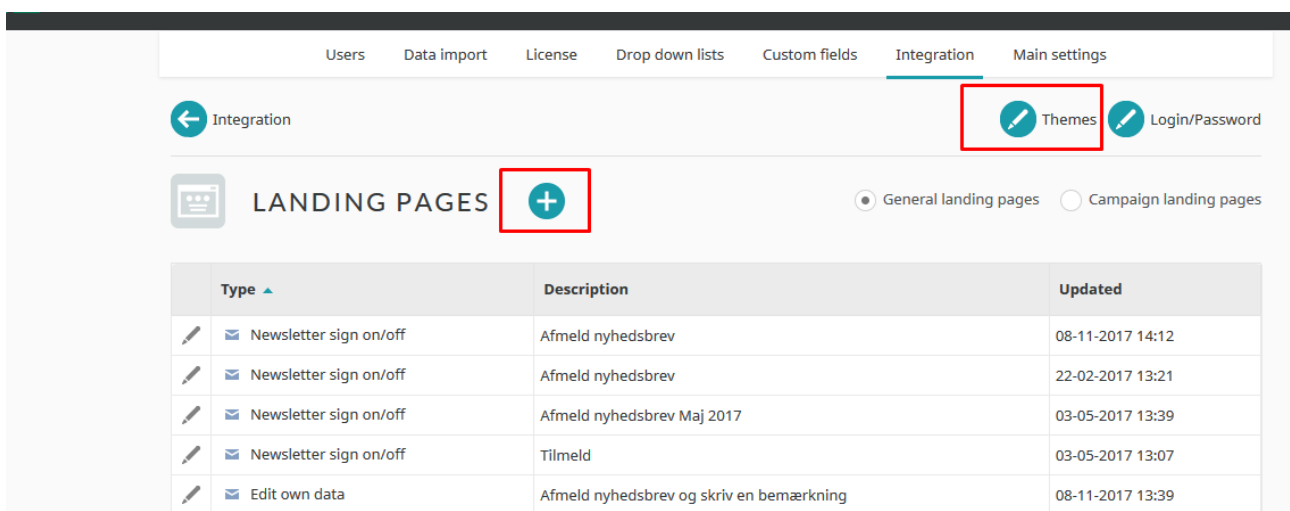## Delete request using landing pages

It's possible to allow customer's/leads request deletion using landing pages in webCRM. Landing pages are available in webCRM PLUS and webCRM ENTERPRISE systems. Landing pages can be configured to automatically create activities when persons submit a delete request, notifying (a) webCRM user(s) to manually delete the requested personal data. In addition, the landing page can trigger an email sent to a webCRM user to further notify about the enquiry.

Level 99 is needed to setup landing pages.

Go to **Configuration → Integration → Landing pages.**

In the upper right corner click **Themes** and setup the desired design for the landing page(s). It is possible to create different themes for different landing pages.

When done creating a theme click the "plus-icon" to create a landing page.

Chose *Edit own data* and name the landing page.

After that setup the specific parameters for the specific landing page e.g. when it should expire which in the case of GDPR delete request should be set to "Never expires". In addition, label the submit button and the confirm message that is shown after clicking the submit button.

Further below in the configuration page it is possible to define if the customer should be presented with any of stored personal data as well as setting up any kind of help text. It is possible to add "hidden data" and add additional data to the activity being created when submitting as well.

If the landing page is just used for deletion enquiries it is not necessary to setup more than the above shown functions as long as a procedure for handling the deletion of persons/organisations is implemented internally for all webCRM users and particularly the person responsible for handling the delete requests.

Mass deletion of persons

If you expect to receive a lot of deletion requests, you can setup the procedure so that is based on a recurring mass-deletion interval e.g. once a week. Then the webCRM user does not have to delete each person's data individually, but instead mass-delete from an overview at a certain frequency.

To be able to mass-delete as described above it will require a custom field containing the information that a user has requested to be deleted. This is done at **Configuration → Custom fields → Persons**. Here a checkbox will suffice.

Just like before a landing page is used for registering delete requests, but instead of creating an activity the landing page submits a check in the custom field here named "Delete request". This can either be done visibly or by using "hidden data" adding the check when the person clicks the submit-button.

When the landing page is created an overview filtering all "Delete request" checkmarks is created as well. From the tab "advanced" in overviews the field "Enabled actions" is set to **Delete data:**

Afterwards, when showing the overview, it then possible to mass-delete by clicking the red cross-icon.

Note: mass-deleting is irreversible.

This should be done frequently e.g. once a week and always before sending out mass emails so that the list is up-to-date and all who have opted out are deleted from the mailing list(s). It can be a good idea to have the responsible webCRM users create an activity reminding them of the mass-deletion process once a week or whichever frequency you decide for your internal process.

Access to the landing page

The customer can get access to the landing page through a unique link generated by webCRM. The link can be send out as a single email or mass mail using email templates containing the merge field for the landing page. Landing page merge fields are found the bottom of the list of merge fields.
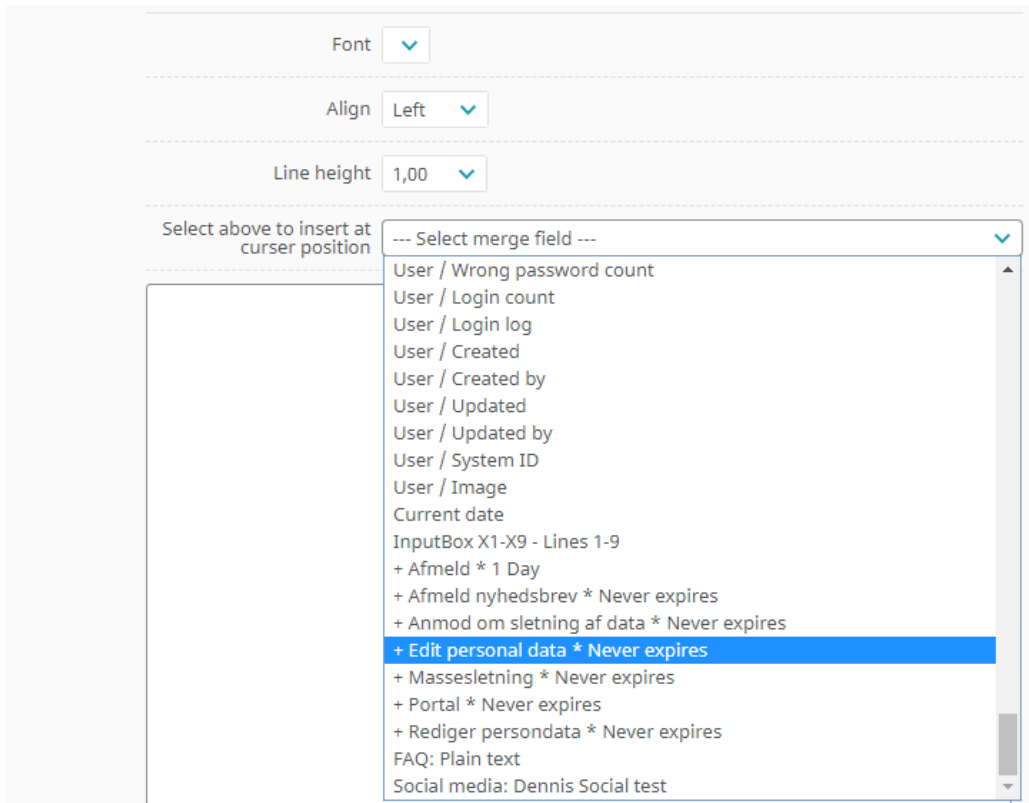
The link will add the description of the landing page as a clickable link (here: Edit personal data) and can be changed from the configuration page for the specific landing page.

In addition to the direct link it is possible to grant users access to this type of landing pages using a portal page from where the customer can login and get access to the data without having to use the direct link. Find the guide to landing pages and portals here.