

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.

	U	sers [Data import	License	Drop down lists	Custom fields	Integration	Main settings
Ģ	Integration							Themes Cogin/Passwor
E	LAND	ING P	AGES	•		۲	General landing	g pages 💫 Campaign landing page
	Туре 🔺			Descrip	tion			Updated
/	Newsletter s	ign on/off		Afmeld r	nyhedsbrev			08-11-2017 14:12
/	Newsletter s	ign on/off		Afmeld r	nyhedsbrev			22-02-2017 13:21
/	Newsletter s	ign on/off		Afmeld r	nyhedsbrev Maj 2017			03-05-2017 13:39
/	Newsletter s	ign on/off		Tilmeld				03-05-2017 13:07
1	🞽 Edit own dat	a		Afmeld r	nyhedsbrev og skriv e	n bemærkning		08-11-2017 13:39

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.

LANDING PAGES Edit own data									
For merge links in emails for	existing contacts								
Description	Delete enquiry	The	eme Tema!						
Expire link after	Never expires 🗸	Time z	one (UTC) Dublin, Edinburgh, Lisbon, London 🔹						
Send email notice to	Organisation responsible 🗸	Acti	ivity Always create new 🗸						
		Ac	tion Andet 🗸						
Submit button text	Please delete my data	Descrip	tion Delete person						
Message after	Thank you for your request. Your data will be	Responsi If create	ble new Thomas Pierog 🗸 🗸						
submitting	deleted within 8 work hours.	Dead	line 0 Days ahead 💙						
Font	12 px normal 🗸	Sta	atus Ongoing 🗸						

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** \rightarrow **Custom fields** \rightarrow **Persons**. Here a checkbox will suffice.

Checkbox 🗸	14 🗸	Delete request	Standard 🗸	12
Label above:	None 🗸			



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.

Data neios	Label(Mandatory) // Comment(Optional	Default input(Optional) @
13360 Person. Delete request 🔹 Read/Write	Please delete me	
Hidden data	Value	
Hidden data Must be different from input fields	Value	

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:**

	Special actions	
Enabled actions	Delete data	~

Afterwards, when showing the overview, it then possible to mass-delete by clicking the red cross-icon. *Note: mass-deleting is irreversible.*

	×				
← 1:	2345	i 6 7 8 97 193 🔶	Rows/page	50 🗸 1-50 (9,63	7) Standard 🗸
		Name		Full name	Email
/	۲	3941 NISSAN		Jens Frederiksen	

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.

Font	v	
Align	Left 🗸	
Line height	1,00 🗸	
Select above to insert at curser position	Select merge field	
	User / Wrong password count	
	User / Login count	
	User / Login log	
	User / Created	
	User / Created by	
	User / Updated	
	User / Updated by	
	User / System ID	
	User / Image	
	Current date	
	InputBox X1-X9 - Lines 1-9	
	+ Afmeld * 1 Day	
	+ Afmeld nyhedsbrev * Never expires	
	+ Anmod om sletning af data * Never expires	
	+ Edit personal data * Never expires	
	+ Massesletning * Never expires	
	+ Portal * Never expires	
	+ Rediger persondata * Never expires	
	FAQ: Plain text	
	Social media: Dennis Social test	

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 <u>here</u>.