

HowTo: Double Opt-In Solutions for Salesforce Professional



Double Opt-In
Package

lead & conduct digital !

<https://login.salesforce.com/packaging/installPackage.apexp?p0=04t1r000000rHs3>

Introduction

The new basic data protection regulation will improve data security and data protection for the persons concerned. With this regulation, companies will be obliged to obtain the explicit consent of those concerned before processing their data in the future. The opt-in procedure will therefore be mandatory for all companies. With our package, the procedure can also be easily introduced with the Salesforce Professional license.

Package content

OBJECTS

Object	Name	Type	Description
Lead	DoubleOptInID	Custom Field (Text, 18)	This field is only necessary for the technical process and can be hidden and ignored.
Lead	Consent	Custom Field (Checkbox)	This checkbox indicates whether the double opt-in has been confirmed. This should be displayed in the lead layout.

CODE

Name	Type	Description
UpdateConsent	APEX Trigger	This trigger checks the double opt-in procedure and sets the checkbox in the lead.
TestUpdateConsent	APEX Class	This class tests the procedure.

Installation

Please install the package provided by us first. This creates all the necessary components.

Go to <https://login.salesforce.com/package/installPackage.apexp?p0=04t1r000000rHs3> → Install for All Users → Install



Install Double Opt-In

By lead & conduct ! - GmbH



☐ Install for Admins Only



☒ Install for All Users



☐ Install for Specific Profiles...

Install

Cancel

In the best case, you will now see the message "Installation Complete". If not, check the **FAQ**.

Preparations

REQUEST CHECKBOX

First we have to create a checkbox in the **Lead** object. To do this, we switch to the *Object Manager* and select the **Lead** object.

Fields & Relationships → New → Type: *Checkbox* → Field Label: *Request* → Next → Next → Save

Field Label	Request	
Default Value	☐ Checked ☒ Unchecked	
Field Name	Request	
Description	This checkbox is placed in the Web-2 lead form and is the first indicator of whether the privacy policy has been approved.	
Help Text		

FIRST WEB2LEAD FORM

Now we are ready to create the first Web2Lead form. This is used for the first request of the lead.

Setup → Marketing → Web-to-Lead → Create Web-to-Lead Form

The form can look different according to your wishes. It is only **important** that our created *Request* checkbox is located in the *Selected Fields* field. After your settings you can generate the form and integrate it on your website to collect leads.

SECOND WEB2LEAD FORM

We need the second Web2Lead form for confirmation.

Setup → Marketing → Web-to-Lead → Create Web-to-Lead Form

Here we only need the field *DoubleOptInID* and *Consent* in *Selected Fields* and generate the form. Now create an accessible **.PHP** file on your FTP server and add the form code. Name the file “*approve.php*”.

Now we have to fill in the form with other functionalities. Leave the values here filled with xxx original.

Change line →

```
DoubleOptInID:<input id="xxx" maxlength="18" name="xxx" size="20" type="text" />
```

to →

```
<input id="xxx" maxlength="18" name="xxx" size="20" value="<?php echo $_GET['s'] ?>" type="text" />
```

Change line →

```
Consent:<input id="xxx" name="xxx" type="checkbox" value="1" /><br>
```

to →

```
<input id="xxx" name="xxx" type=hidden value="1" checked/>
```

EMAIL TEMPLATE

To realize the Double-Opt-In process we need at least one email template. After registration on the website, a confirmation link must be sent out automatically.

Setup → Email → Email Templates → New Template → check HTML (using Letterhead) → Next

INFO: If you have not yet created a letterhead, first create a letterhead and then return to the email template.

Email Template Information

Folder	Unfiled Public Email Templates
Available For Use	☒
Email Template Name	Web-to-Lead Confirm Link
Template Unique Name	Web_to_Lead_Confirm_Lir 
Letterhead	Sample Letterhead
Email Layout	Free Form Letter View Email Layout Options
Encoding	General US & Western Europe (ISO-8859-1, ISO-LATIN-1)
Description	This Email will be send automatically.

If all values match you can click **Next**. In the email content it is important that the link to the newly created PHP file is included. The following code must be added after the link: `?s={!Lead.Id}`

HTML Email Content

Subject

Please confirm your registration

Next → Copy text from HTML version → Save

LEAD AUTO-RESPONSE RULES

Setup → Marketing → Lead Auto-Response Rules → New

Save → Click on Web-to-lead Confirm Link → Rule Entries → New

Web-to-lead Confirm Link

Enter the rule entry

Save

Save & New

Cancel

Step 1: Set the order in which this rule entry will be processed

Sort Order

i

1

Save

Now the double opt-in procedure should be implemented! Congratulations!

FAQ

PAKET INSTALLATION FAILED

Please check if the package is already installed. Du siehst deine installierten Pakete unter Setup → Apps → Installed Packages

SUPPORT

If you have any other problems or have any questions. Write an email to km@lead-conduct.de.