Consent Capture Setup Guide

Installing Consent Capture

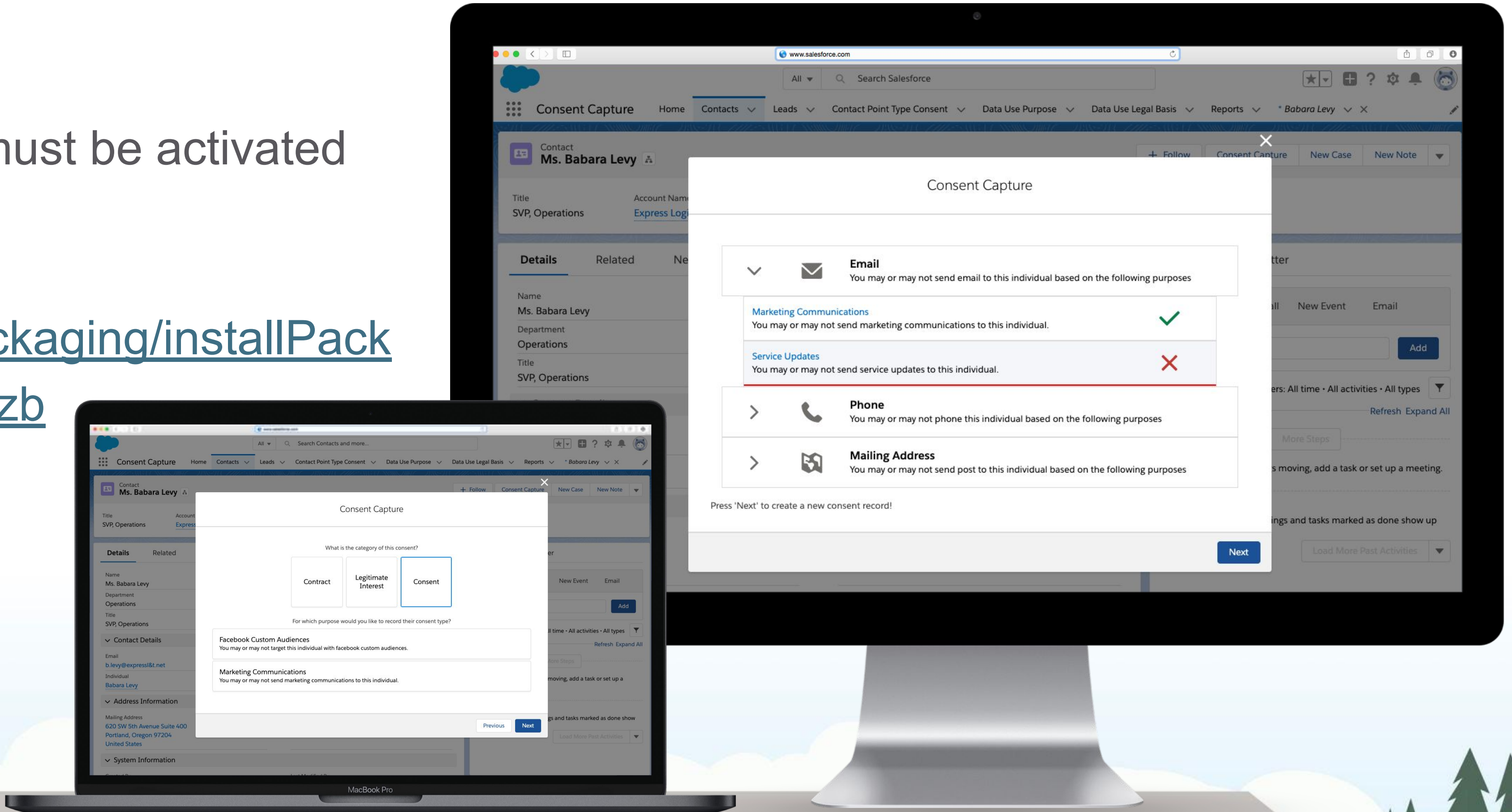
Consent Capture Uses 100% standard objects to help you manage your consent records

Requirements

- Data protection & privacy must be activated

Consent Capture V1.2

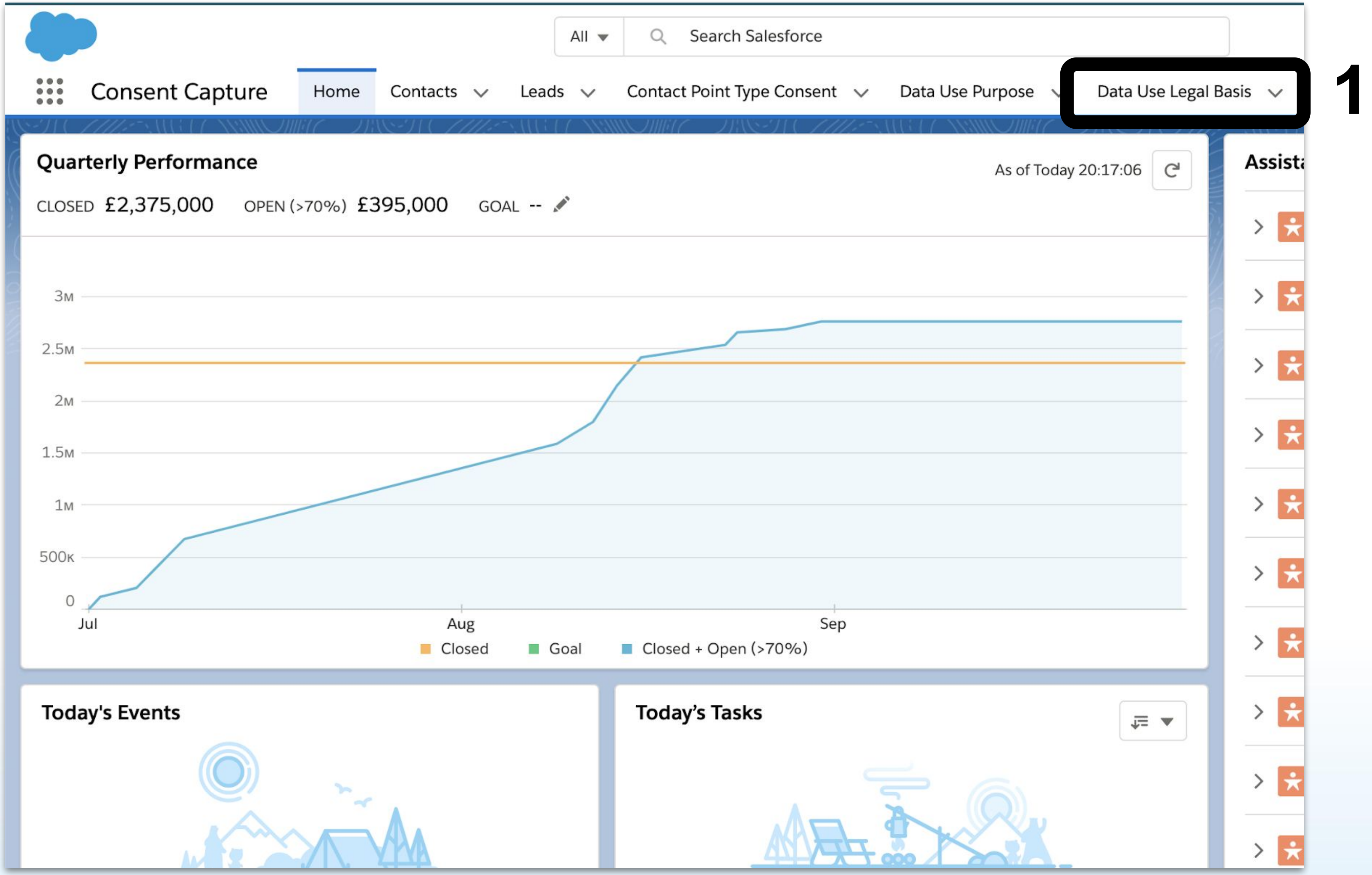
https://login.salesforce.com/packaging/installPackage.apexp?p0=04t4J000001Glzb



Create your data use legal basis records

Now that you are in the Consent Capture App, let's create some data to get started.

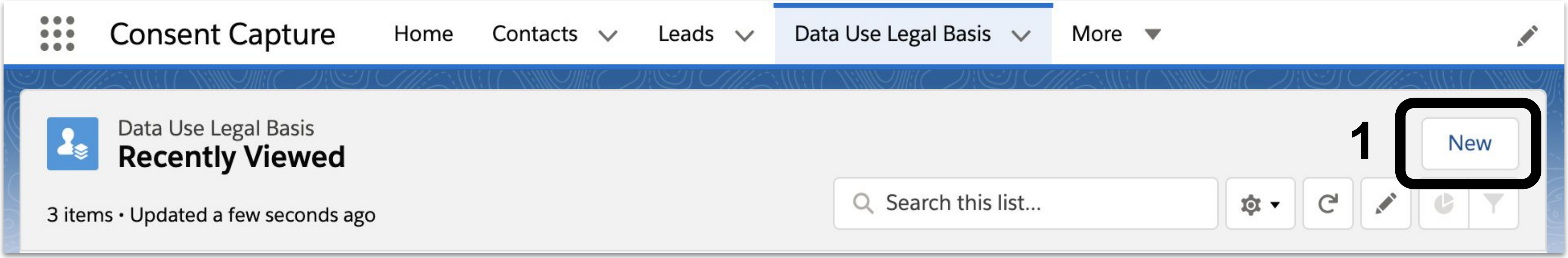
1. Navigate to the Data Use Legal Basis Tab



Create your data use legal basis records

The Data Use Legal Basis tab will be used to make all of the Legal Bases assessable by your users.

1. Click ‘New’ to create your first Data Use Legal Basis



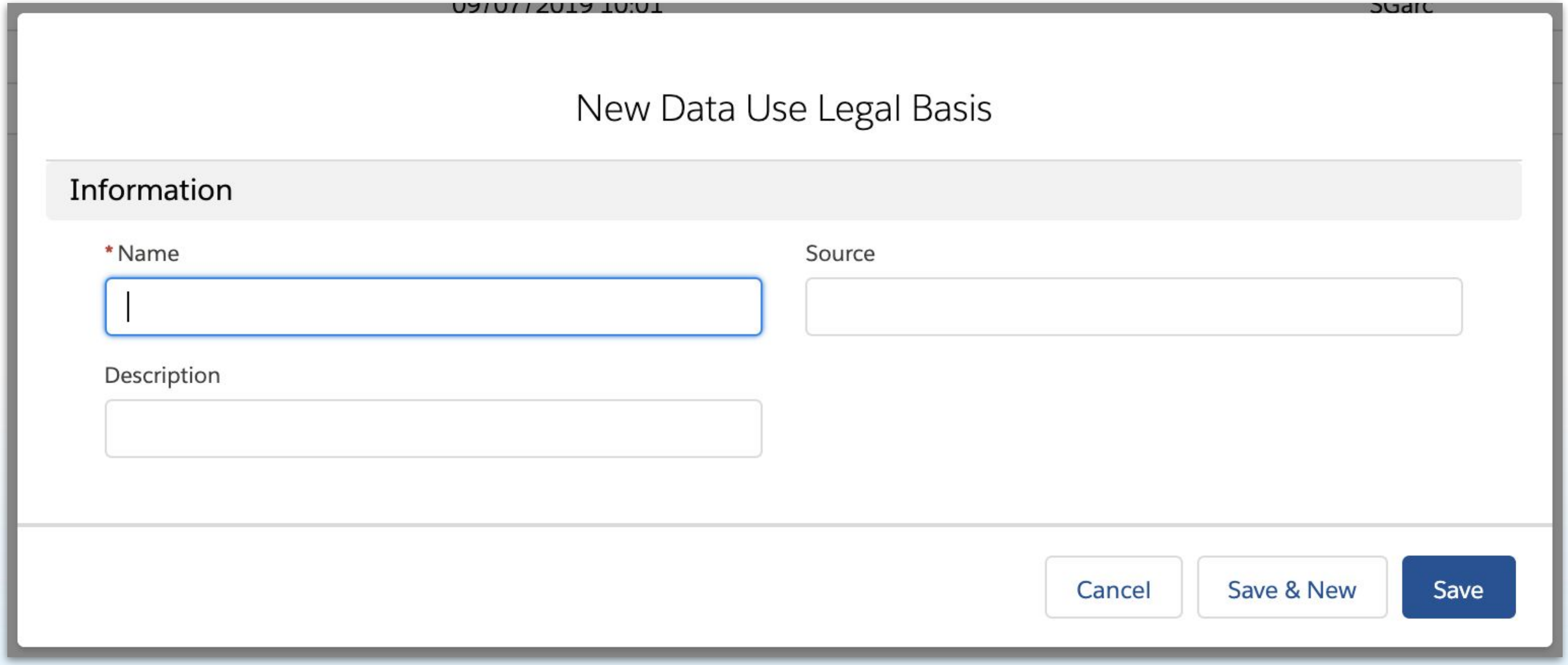
Create your data use legal basis records

The Foundation of the Data Use Purpose is a Legal Basis for which you are creating a consent record.

1. Working together with your legal & marketing teams, define your Legal Bases
2. Create a ‘Data Use Legal Basis’ Record for each of them as defined

Examples of a Legal Basis would be

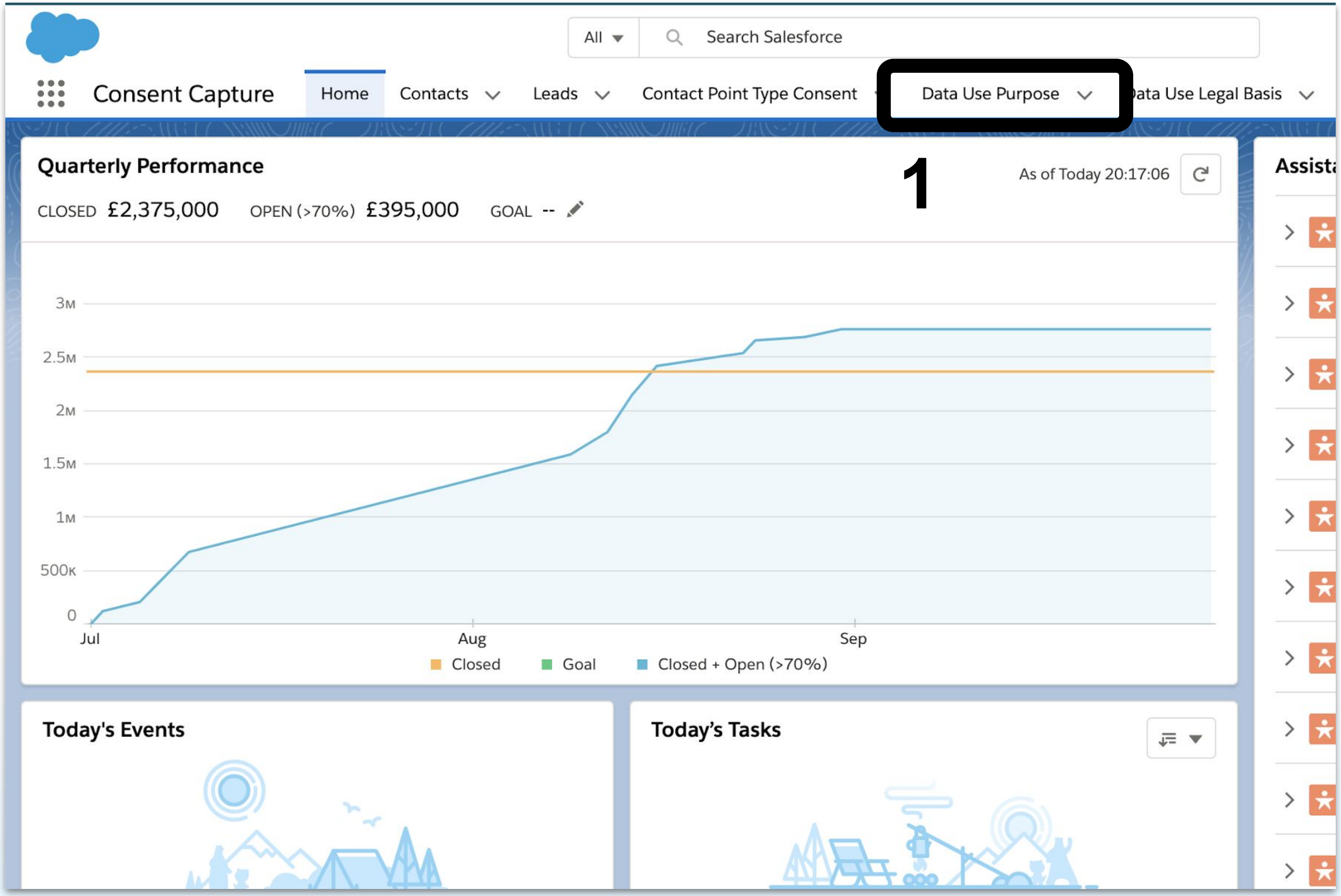
- Consent
- Contract
- Legitimate Interest



Create your Data Use Purpose Records

Next, let's create our first Data Use Purpose Record.

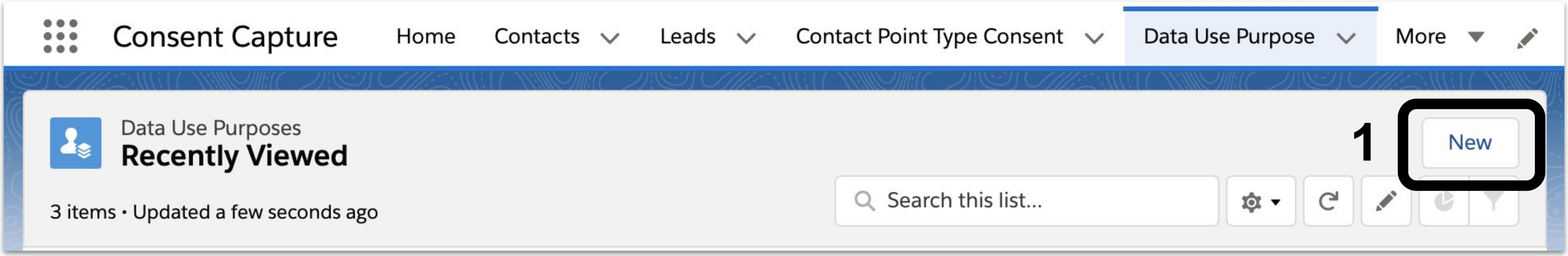
1. Navigate to the Data Use Purpose Tab



Create your Data Use Purpose Records

The Data Use Purpose tab will be used to make all of the purposes assessable by your users.

1. Click ‘New’ to create your first Data Use Purpose



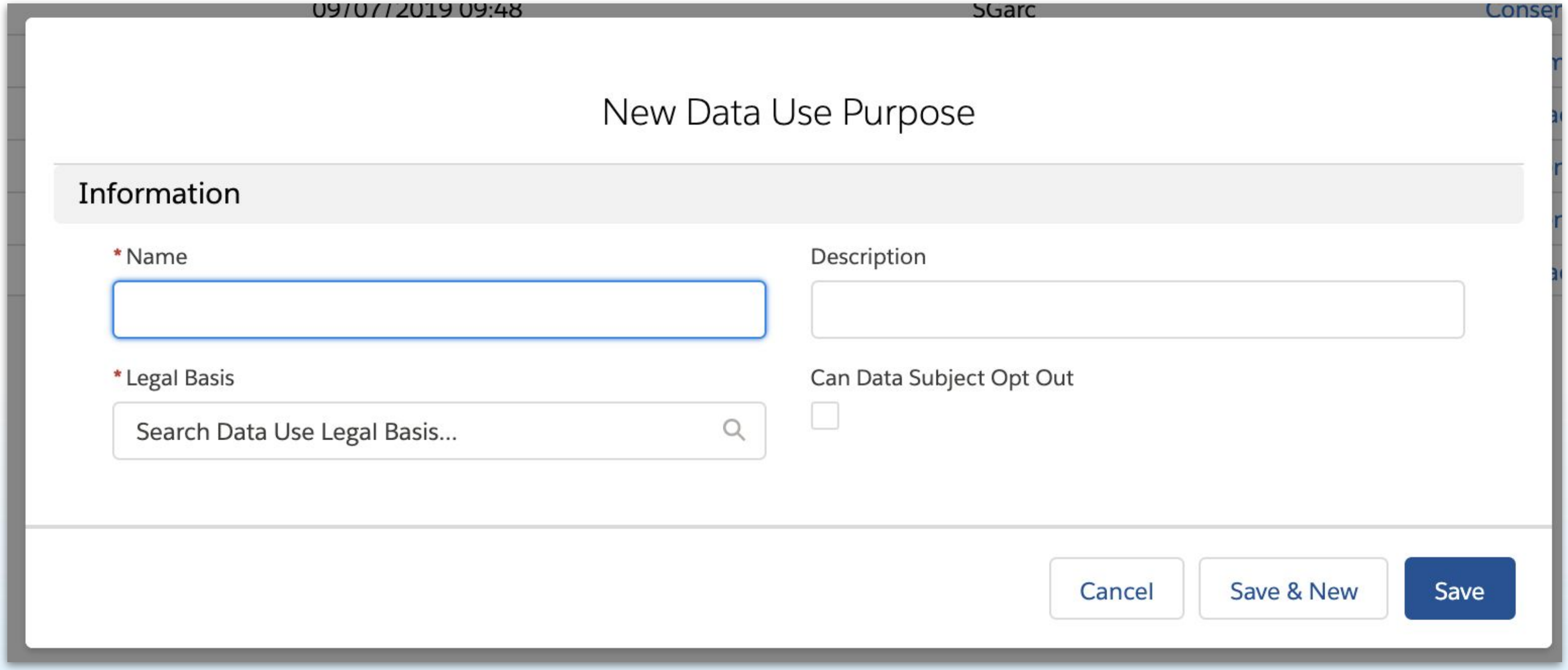
Create your Data Use Purpose Records

The Data Use Purpose is used to manage the actions that you take with using an individual's personal data.

1. Working together with your legal & marketing teams, define your Data Use Purposes
2. Create a ‘Data Use Legal Purpose Record for each of them as defined
3. Attach the Legal Basis that supports this Data Use Purpose

Examples of a Data Use Purpose would be

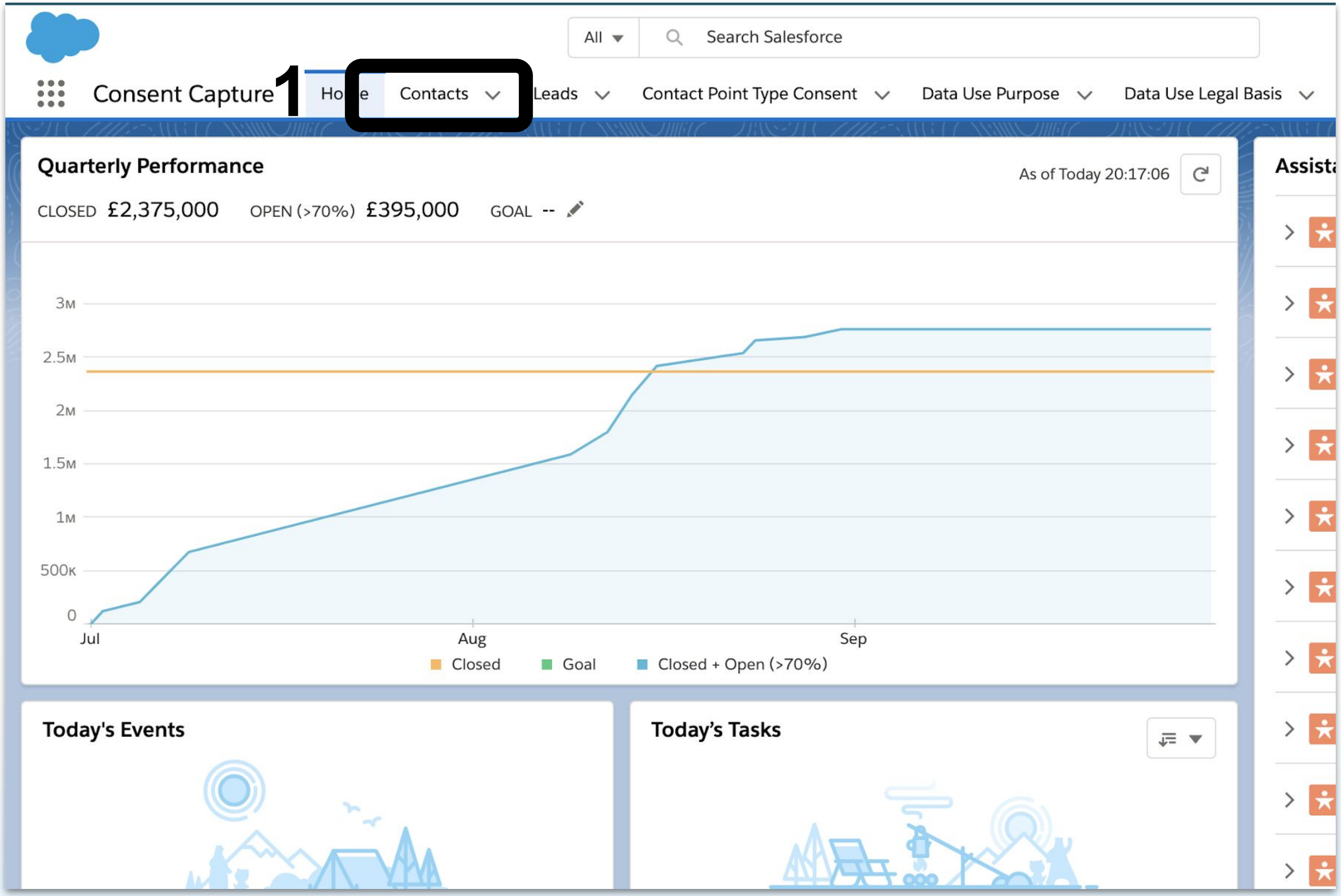
- Marketing Emails
- Direct Phone Calls
- Direct Mail



Add Flow to Page Layout

Next, let's add the Flow to you page layout.

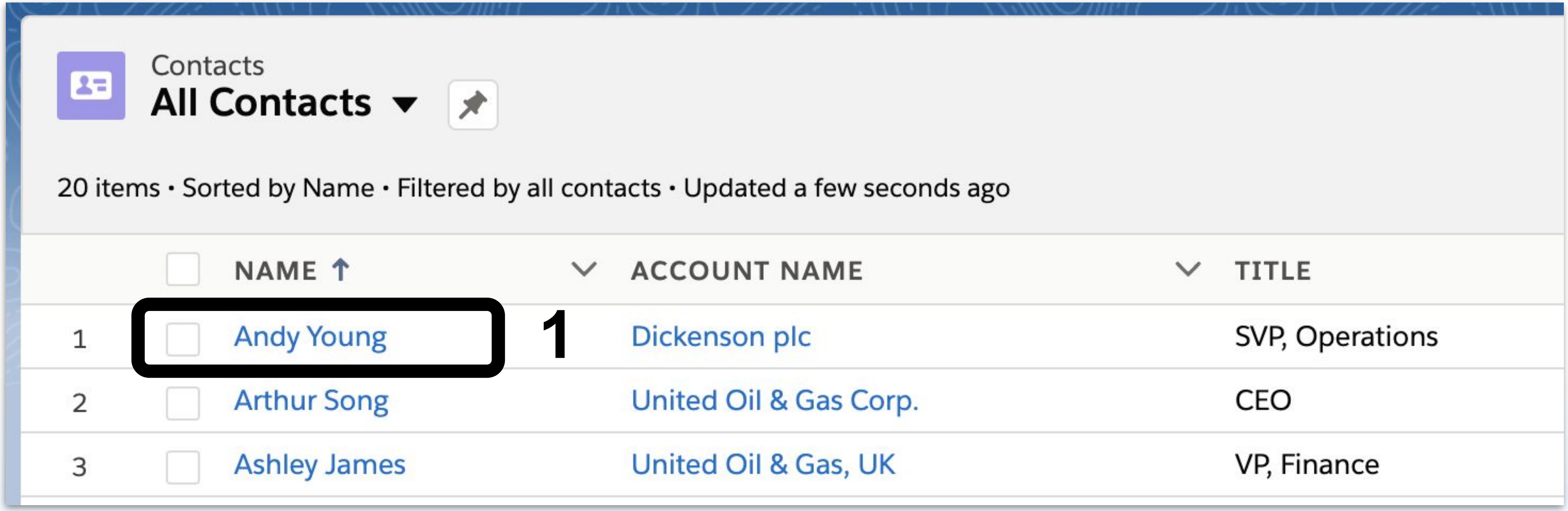
1. Navigate to the Contacts tab



Add Flow to Page Layout

Navigate to a contact record page to update the page layout.

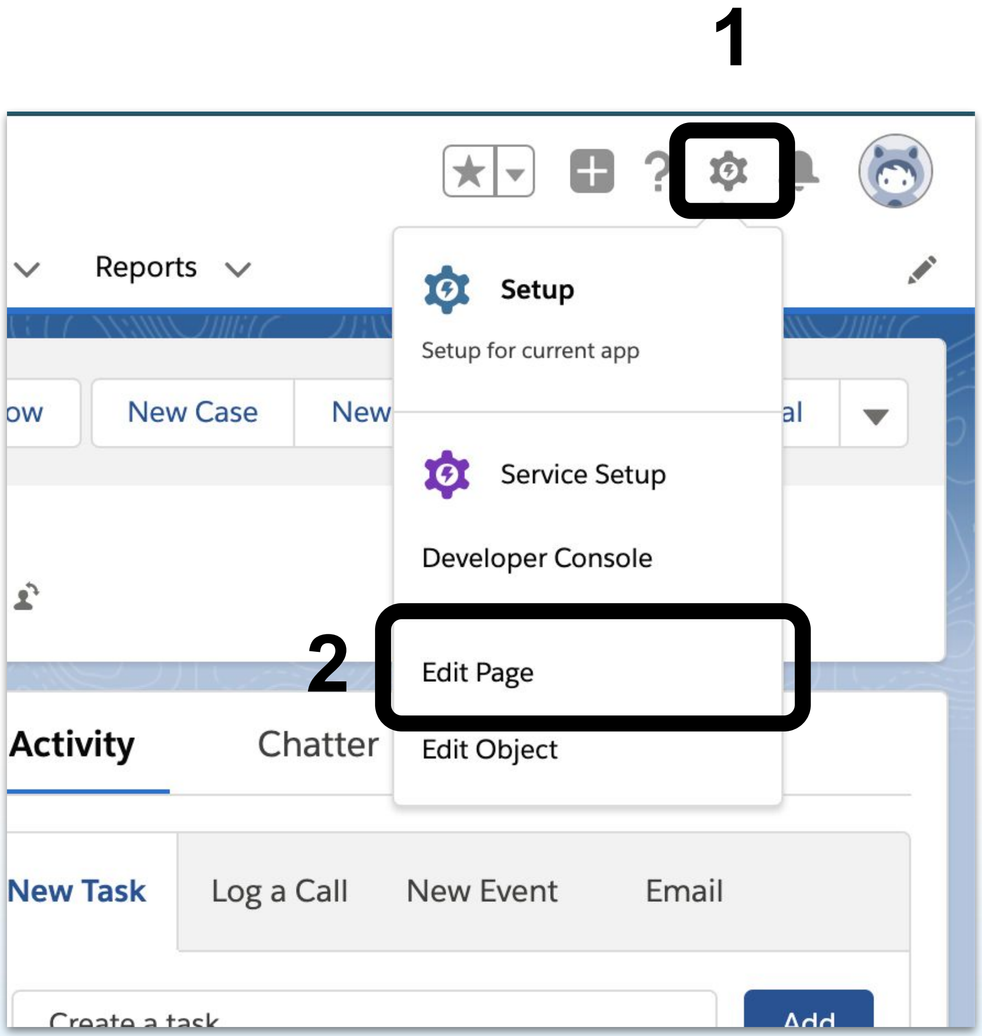
1. Click the name of any Contact Record



Add Flow to Page Layout

Edit the Contact Page Layout

1. Click on the setup menu icon
2. Click on ‘Edit Page’

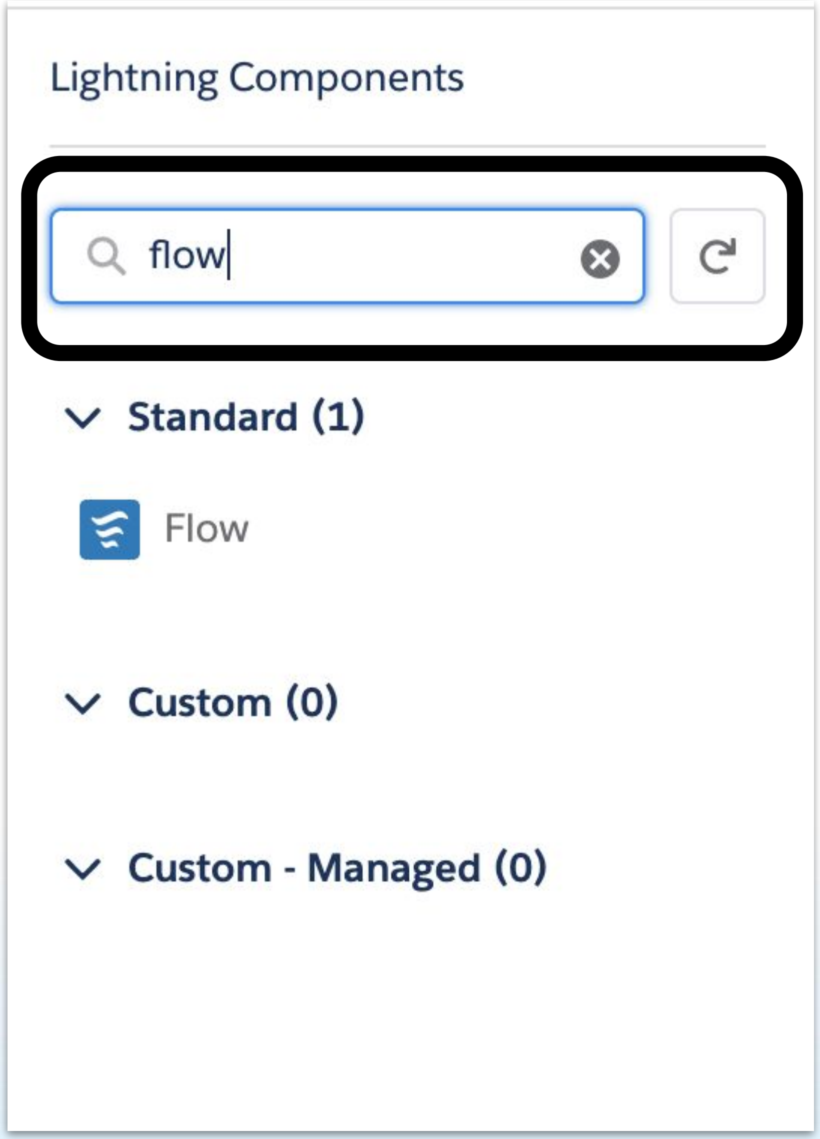


Add Flow to Page Layout

Edit the Contact Page Layout

1. Search for flow in the Lightning Components pane

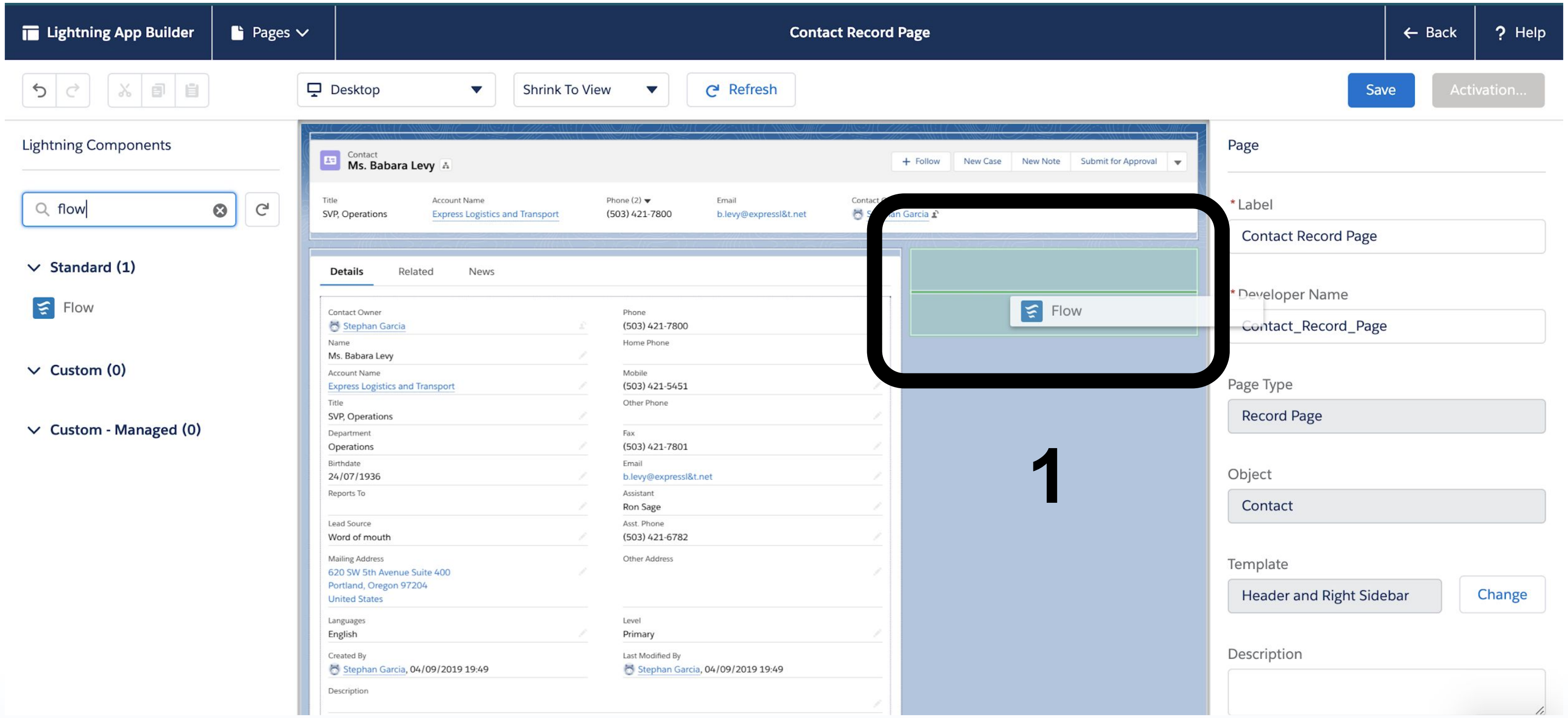
1



Add Flow to Page Layout

Edit the Contact Page Layout

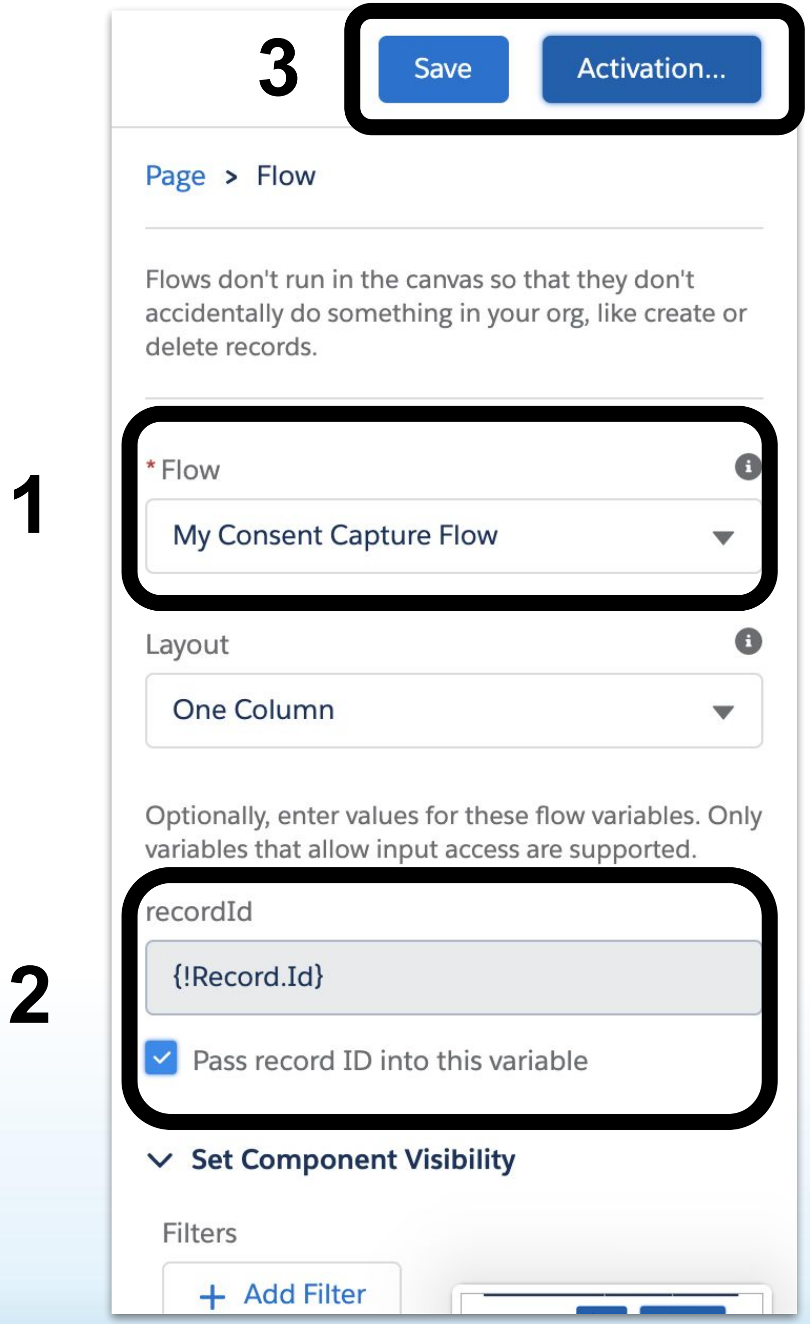
1. Drag the Flow into an empty region of the page.



Add Flow to Page Layout

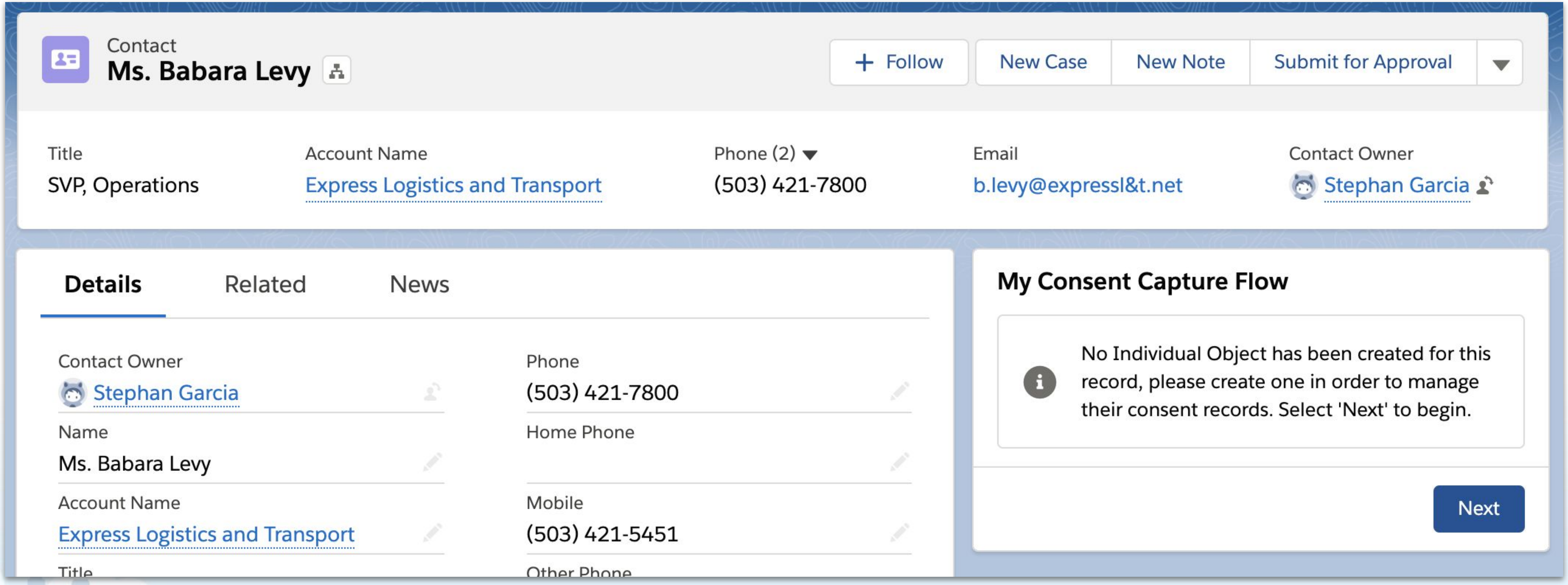
Edit the Contact Page Layout

1. Select the Consent Capture Flow
2. Pass the Record Id into the variable
3. Save the page



Add Flow to Page Layout

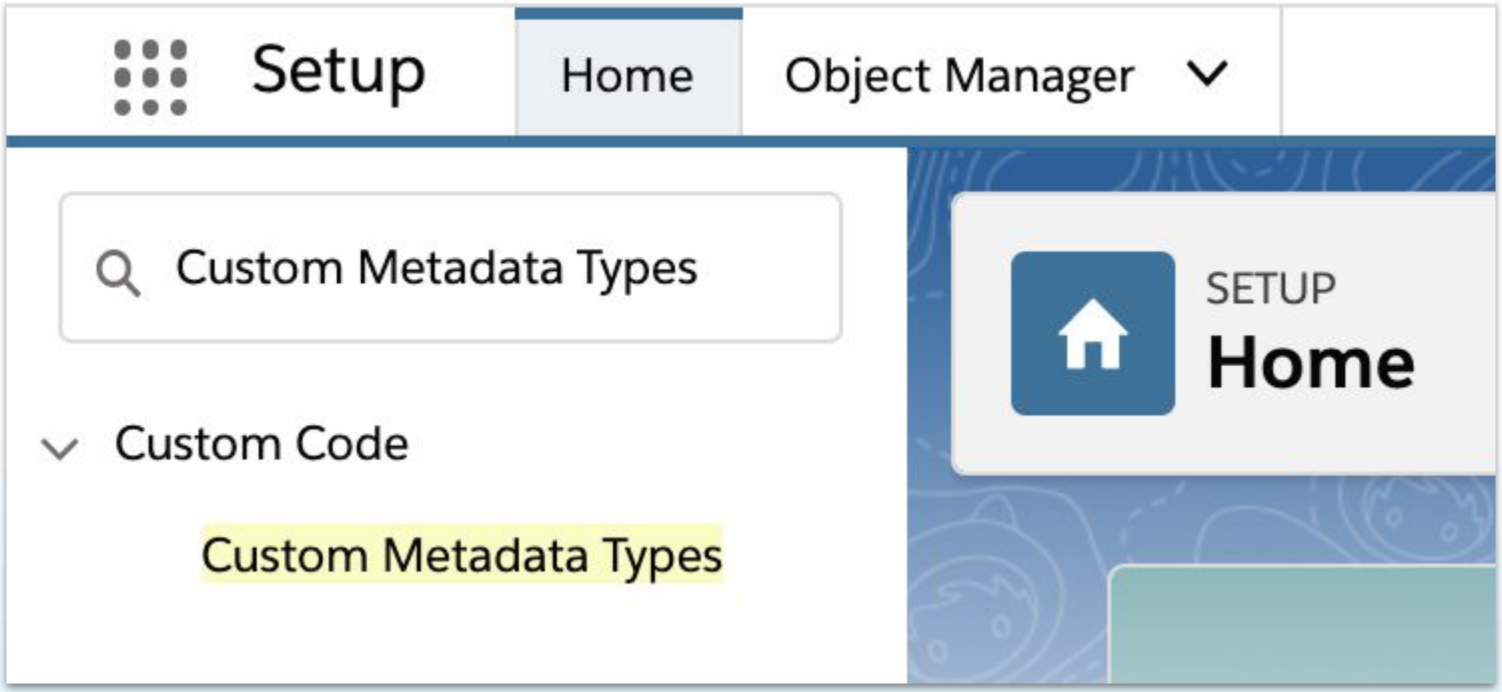
Consent Capture Can now be used by your users on the Contact page! Now follow the same steps for the Leads object!



Update Consent Type Descriptions

The Consent type descriptions are used to explain to your users what each category means.

1. Navigate to Salesforce Setup
2. Search for 'Custom Metadata Types' in the quick find
3. Select 'Custom Metadata Types'



Update Consent Type Descriptions

1. Look for the ‘Consent Capture Utility’ Custom Metadata Type
2. Select ‘Manage Records’

New Custom Metadata Type

Action	Label	Namespace Prefix	Visibility	Api Name	Record Size	Description
Del | Manage Records	Consent Capture Utility	concap	Public	concap__Consent_Capture_Utility__mdt	906	This is a general set of utilities and settings to manage the consent capture app exchange solution

Update Consent Type Descriptions

1. You will see a list of each out of the box Consent Type Value from the Contact Point Type Consent Record
2. Select any Label to edit it's Settings

Consent Capture Utilities

Help for this Page

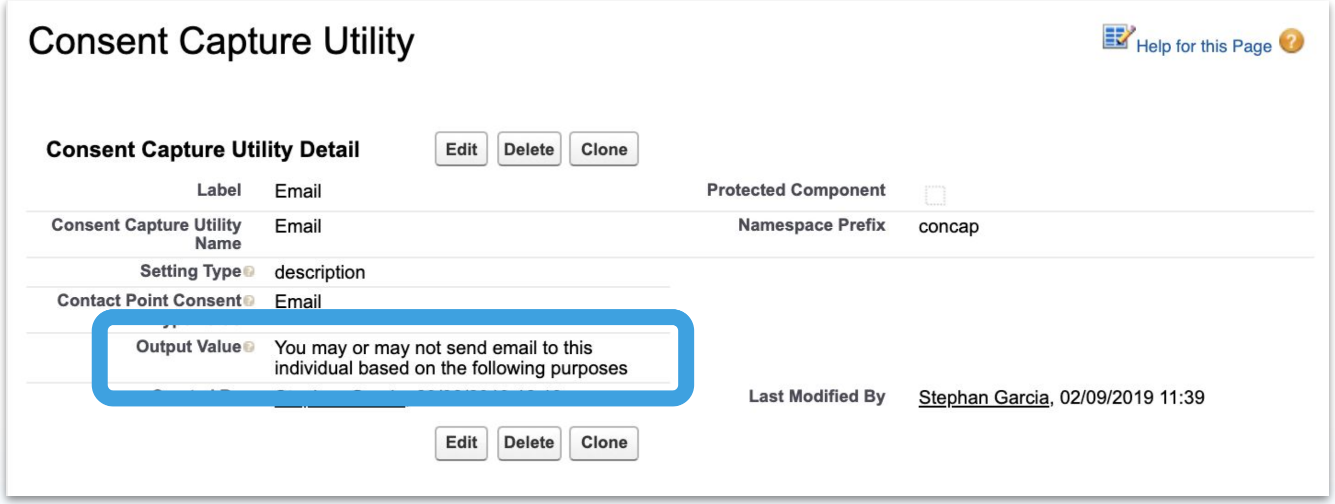
View: All Create New View

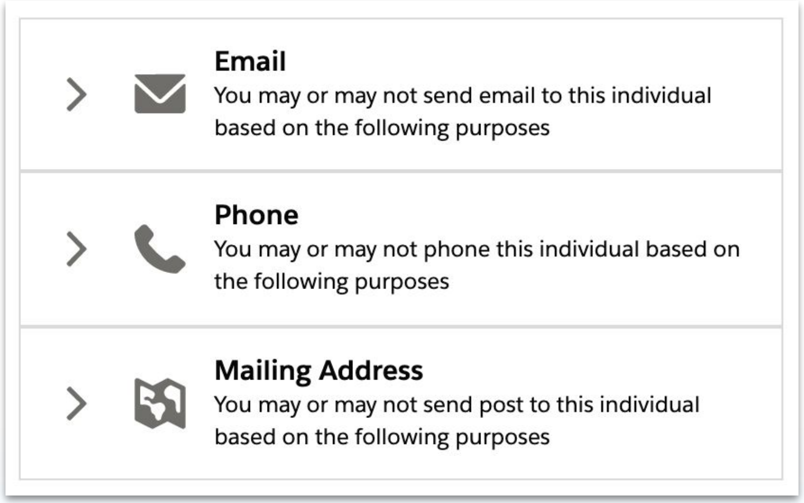
New

Action	Label ↑	Consent Capture Utility Name	Namespace Prefix
Edit | Del	Email	Email	concap
Edit | Del	Mailing Address	Mailing_Address	concap
Edit | Del	Phone	Phone	concap
Edit | Del	Social	Social	concap
Edit | Del	Web	Web	concap

Update consent type descriptions

1. You may then see the specification of the record and update it’s fields
2. The ‘Output Value’ is used to display to your users when they are using Consent Capture





Contact point type consent fields & values

	Details	Variable
Name	Text - used to store a concatenation of the Contact Point Type Name & Data Use Purpose Name	{!contactPointConsentType} & {!dataUsePurposeName}
Contact Point Type	Picklist - The type of contact point you are recording	{!contactPointConsentType}
Party	Lookup - the individual associated to the consent	{!individualId}
Data Use Purpose	Lookup - lookup to the purpose of the consent type	{!dataUsePurposeId}
Consent Status	Picklist - the level of knowledge the individual has about the consent record	{!consentStatus}
Capture Contact Point Type	Picklist - the method in which you collected the consent from the individual	{!captureContactPointType}
Capture Source	Text - the details as to how you acquired this consent.	{!captureSource}

Contact point type consent fields & values

	Details	Variable
Capture Date	Date/Time - The date the consent record was captured	Today
Effective From	Date/Time - The date that the consent record begins	Today
Effective To	Date/Time - the date that the consent record is active until	Formula - {!monthsActive} + Today()
Double Consent Capture Date	Date/Time - the date time that double consent was captured	Not Used


thank you