

Consent Capture Setup Guide



Installing Consent Capture



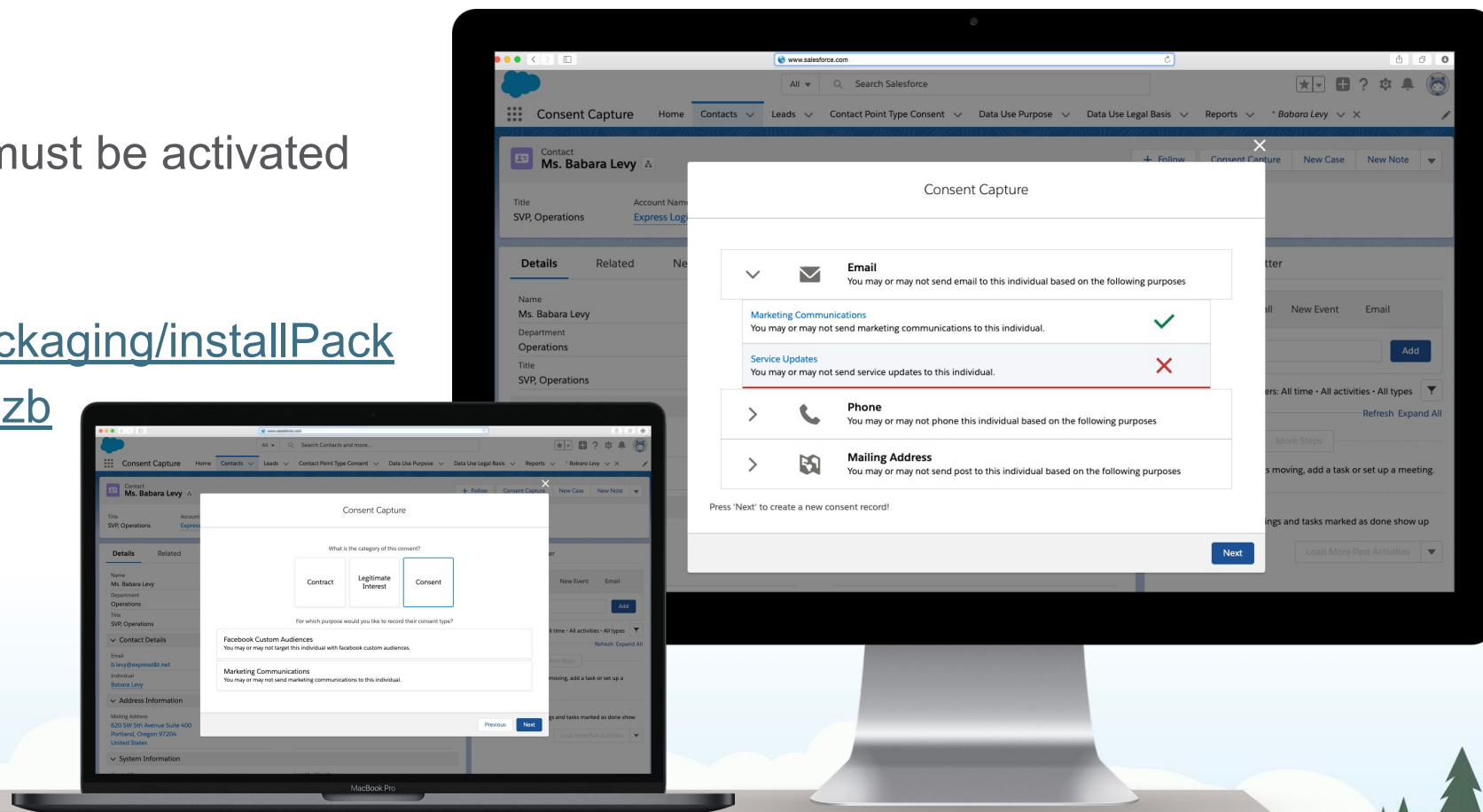
Consent Capture Uses 100% standard objects to help you manage your consent records

Requirements

- Data protection & privacy must be activated

Consent Capture V1.2

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

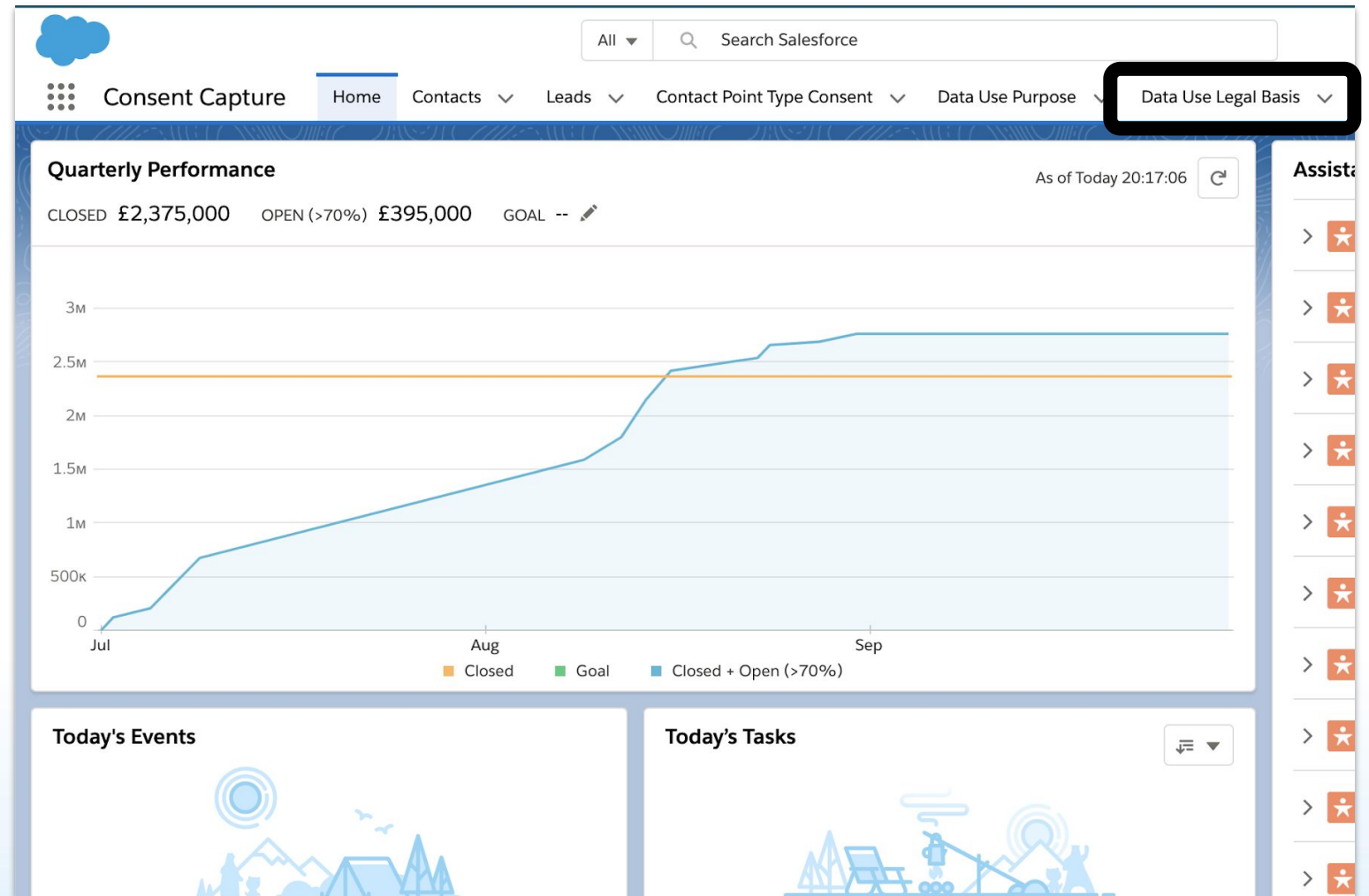


Create your data use legal basis records



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



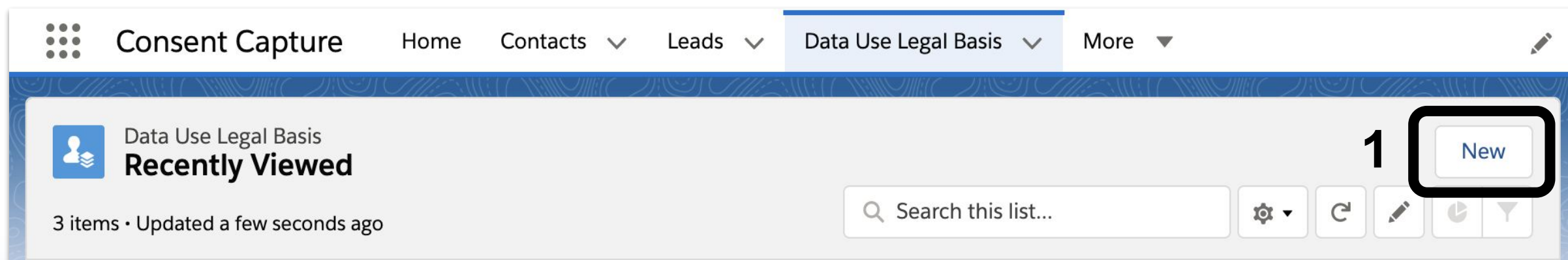
1

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



The screenshot shows the Salesforce interface for the 'Data Use Legal Basis' tab. The top navigation bar includes 'Consent Capture', 'Home', 'Contacts', 'Leads', 'Data Use Legal Basis' (selected), and 'More'. Below the navigation bar, the 'Data Use Legal Basis' section is displayed with a 'Recently Viewed' header and a 'New' button. The 'New' button is highlighted with a black box and a large number '1'. Below the 'New' button, there is a search bar labeled 'Search this list...' and several action buttons: a settings gear, a refresh icon, an edit icon, a chart icon, and a filter icon. The text '3 items • Updated a few seconds ago' is visible at the bottom left of the section.

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

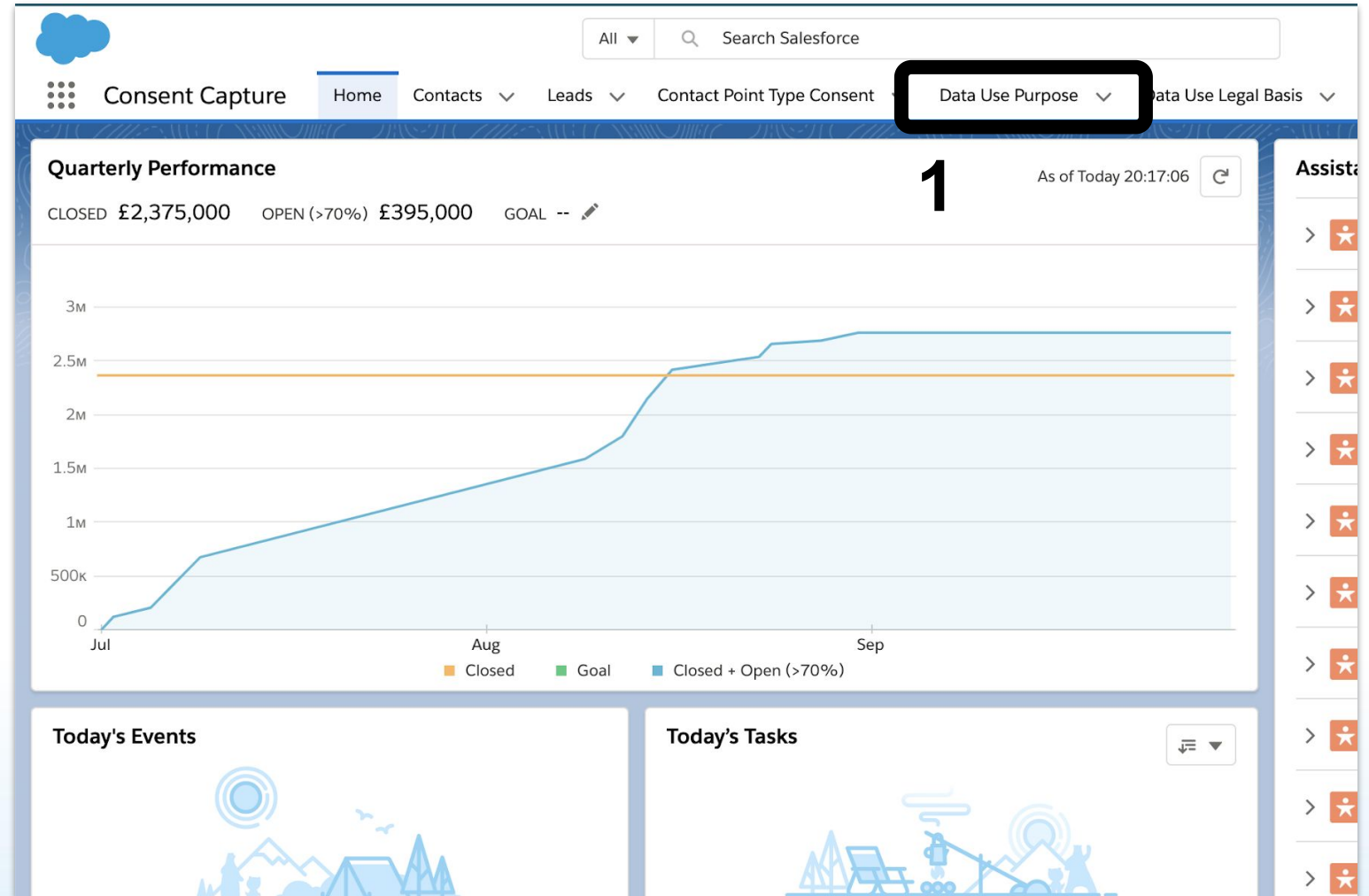
A screenshot of a Salesforce form titled "New Data Use Legal Basis". The form has a header bar with the title. Below the header, there is a section titled "Information" in a light gray bar. Under this section, there are three input fields: a required field for "Name" (indicated by an asterisk), a field for "Source", and a field for "Description". The "Name" field contains a single vertical bar character. At the bottom right of the form, there are three buttons: "Cancel", "Save & New", and "Save". The "Save" button is highlighted in blue. The form is displayed within a window that shows a timestamp of "09/07/2019 10:01" and a user name "SGarc" in the top right corner.

Create your Data Use Purpose Records



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

1. Navigate to the Data Use Purpose Tab

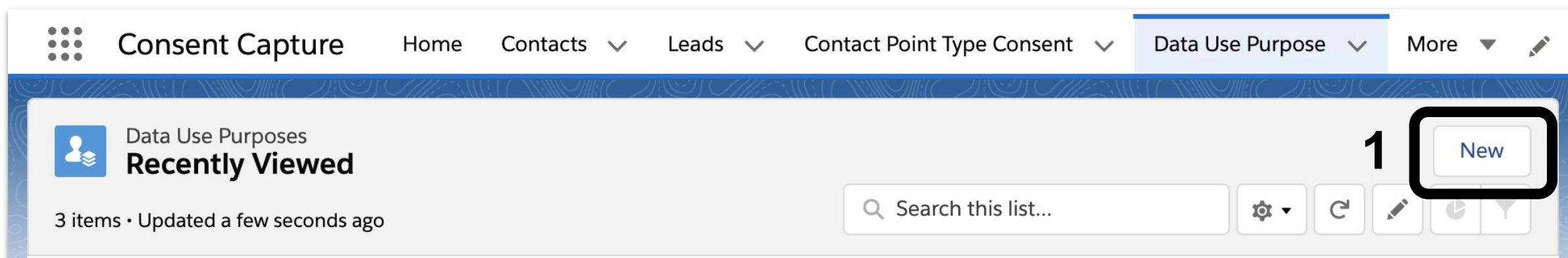


Create your Data Use Purpose Records



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



The screenshot shows the Salesforce interface with the 'Data Use Purpose' tab selected. The navigation bar includes 'Consent Capture', 'Home', 'Contacts', 'Leads', 'Contact Point Type Consent', 'Data Use Purpose', and 'More'. Below the navigation bar, the 'Data Use Purposes' section is titled 'Recently Viewed' and shows '3 items • Updated a few seconds ago'. A search bar labeled 'Search this list...' is present. On the right side of the list, there is a 'New' button highlighted with a red box and the number 1, indicating the first step in the process.

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

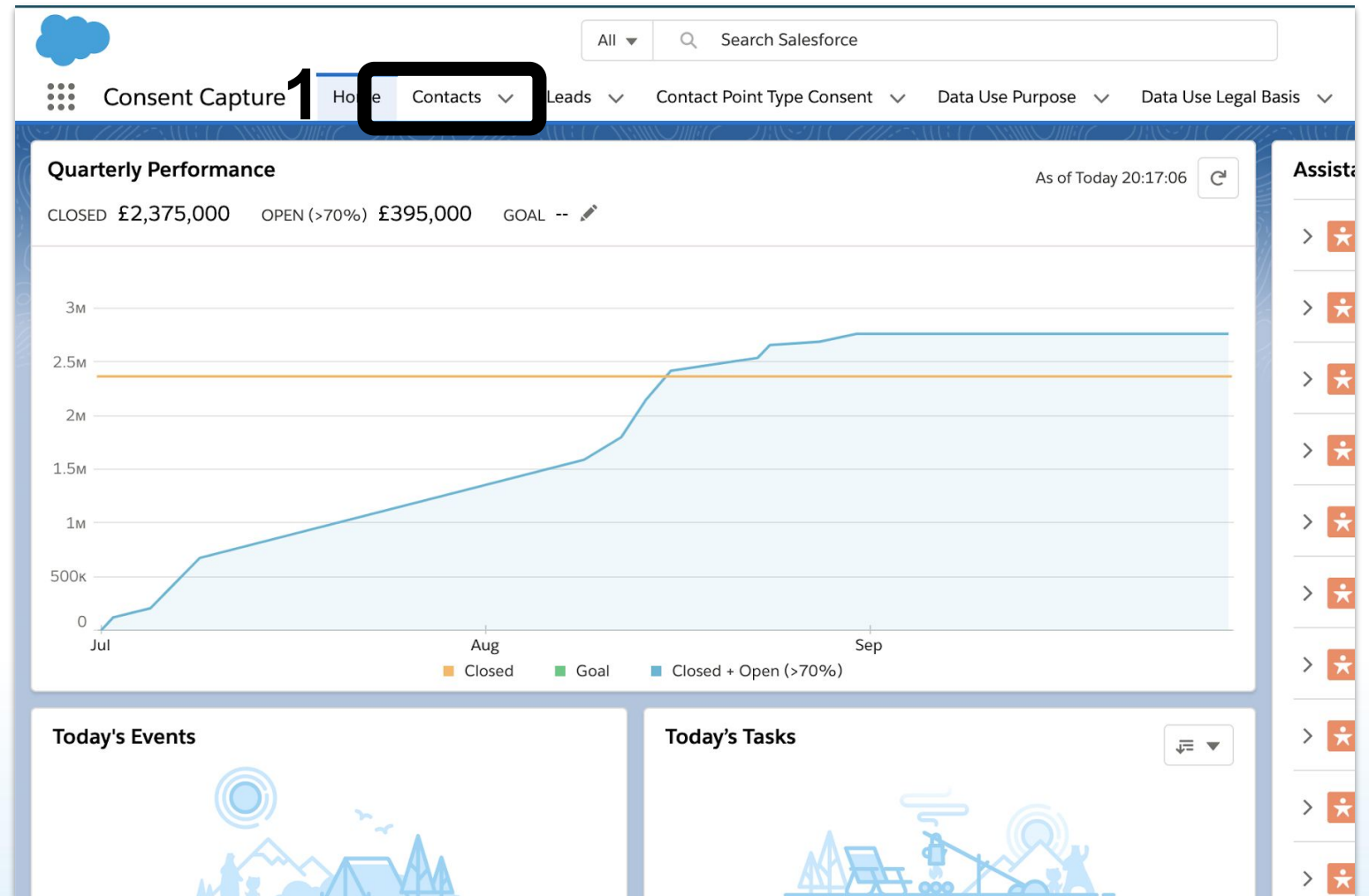
A screenshot of the 'New Data Use Purpose' form in Salesforce. The form is titled 'New Data Use Purpose' and has a tab labeled 'Information'. It contains four fields: 'Name' (required, marked with a red asterisk), 'Description', 'Legal Basis' (required, marked with a red asterisk), and 'Can Data Subject Opt Out' (a checkbox). The 'Name' field is currently empty and has a blue border. The 'Legal Basis' field is a search bar with the placeholder text 'Search Data Use Legal Basis...' and a magnifying glass icon. At the bottom right of the form are three buttons: 'Cancel', 'Save & New', and 'Save'. The 'Save' button is highlighted in blue. The form is displayed within a browser window with a timestamp of '09/07/2019 09:48' and a user name 'SGarc' visible at the top.

Add Flow to Page Layout



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

1. Navigate to the Contacts tab

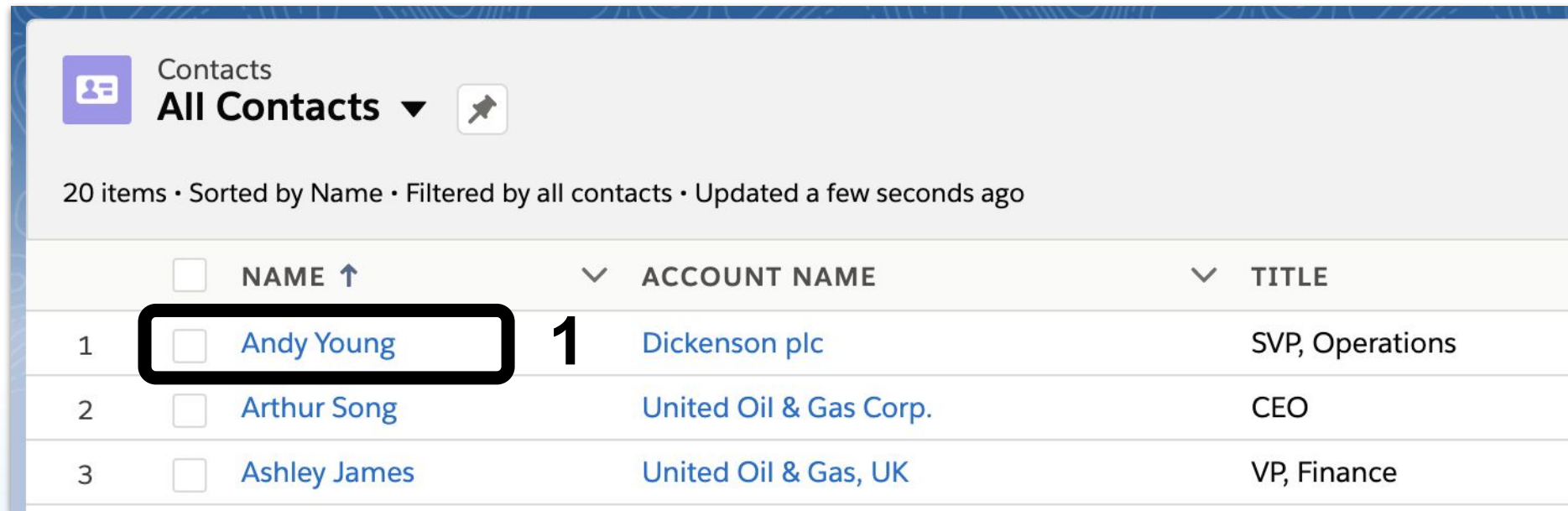


Add Flow to Page Layout



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

1. Click the name of any Contact Record



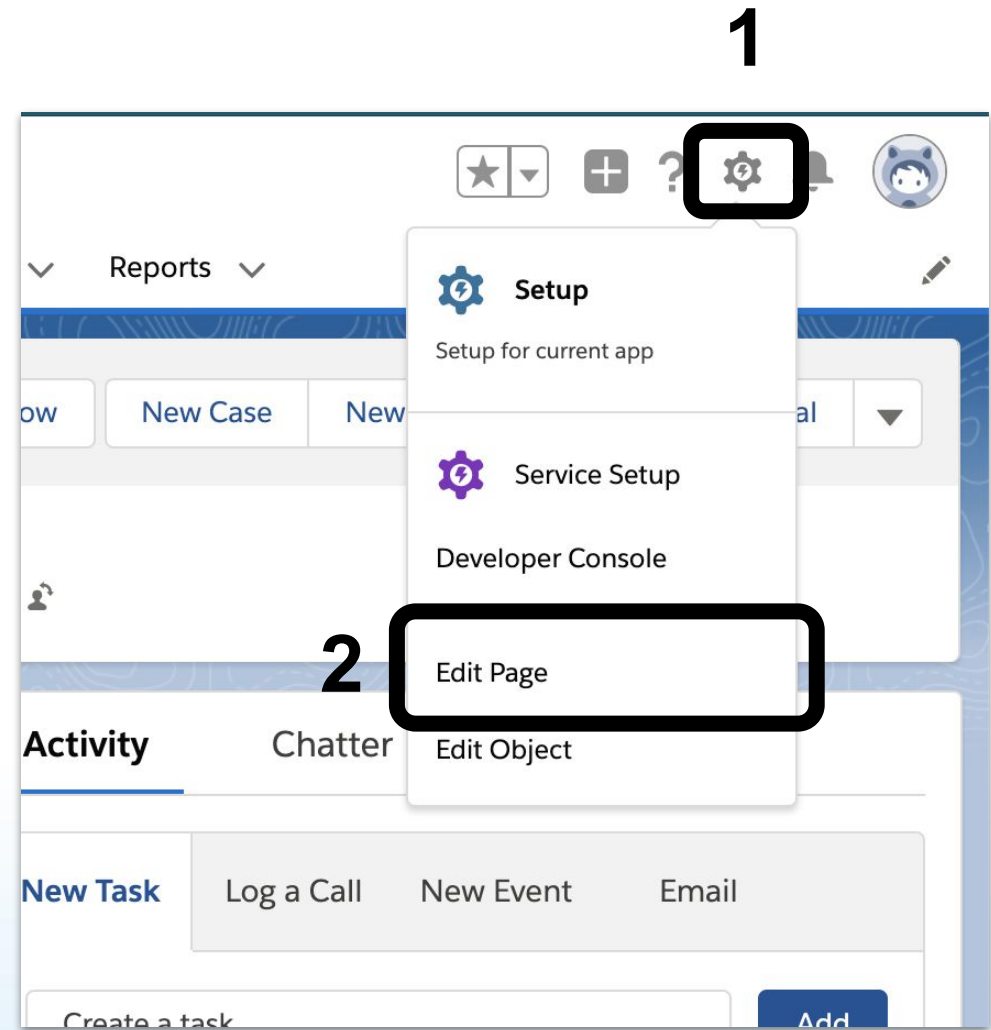
	☐ NAME ↑	▼ ACCOUNT NAME	▼ TITLE
1	☐ Andy Young	Dickenson plc	SVP, Operations
2	☐ Arthur Song	United Oil & Gas Corp.	CEO
3	☐ Ashley James	United Oil & Gas, UK	VP, Finance

Add Flow to Page Layout



Edit the Contact Page Layout

1. Click on the setup menu icon
2. Click on 'Edit Page'



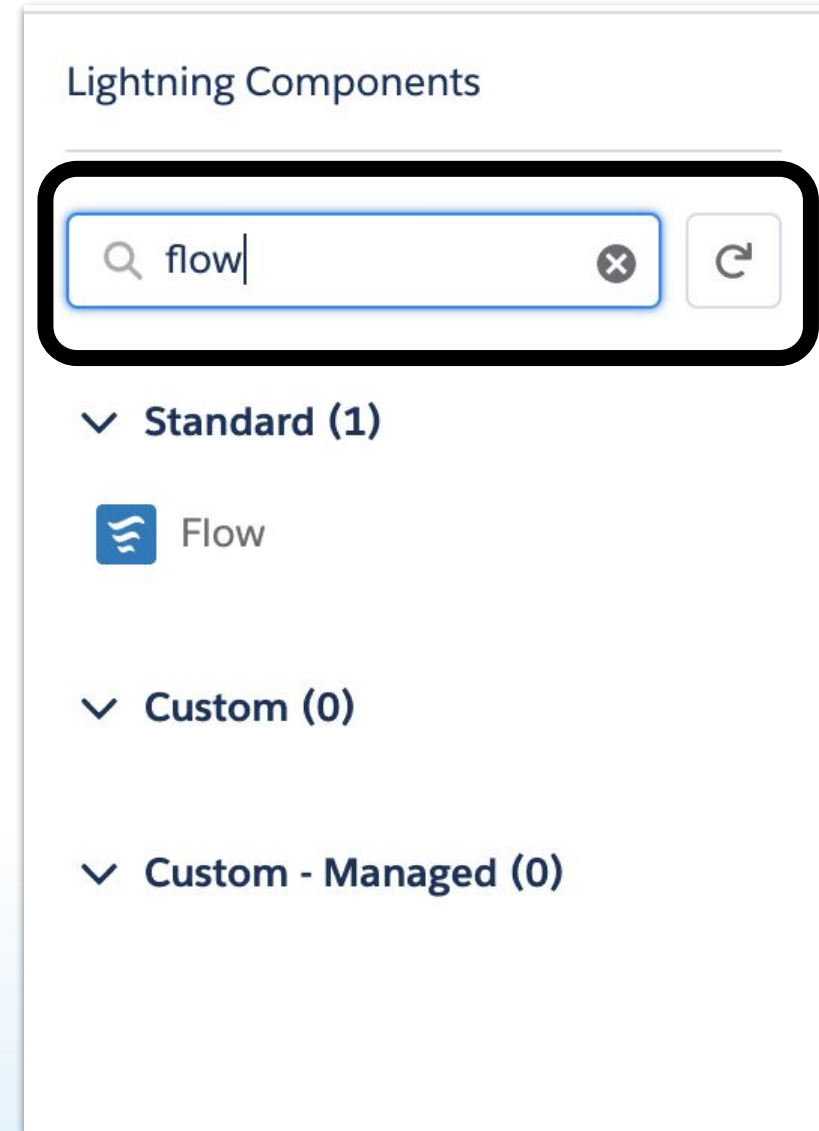
Add Flow to Page Layout



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.

The screenshot displays the Salesforce Lightning App Builder interface for editing a 'Contact Record Page'. The top navigation bar includes 'Lightning App Builder', 'Pages', and 'Contact Record Page'. Below the navigation bar, there are icons for undo, redo, delete, and copy, along with a 'Desktop' view selector, 'Shrink To View', and a 'Refresh' button. On the left, the 'Lightning Components' panel shows a search bar with 'flow' entered, and a list of components under 'Standard (1)' including 'Flow'. The main area shows a preview of the 'Contact Record Page' for 'Ms. Barbara Levy'. A large blue rectangular region on the page is highlighted with a black border and a large number '1', indicating the target area for adding a component. On the right, the 'Page' configuration panel shows fields for 'Label' (Contact Record Page), 'Developer Name' (Contact_Record_Page), 'Page Type' (Record Page), 'Object' (Contact), 'Template' (Header and Right Sidebar), and 'Description'.

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

1

2

The screenshot shows the Salesforce Page Editor interface. At the top, there is a header with the number '3' and two buttons: 'Save' and 'Activation...'. Below the header, the breadcrumb 'Page > Flow' is visible. A warning message states: 'Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.' The main configuration area is divided into sections. The first section, labeled '1', is the 'Flow' component, which is highlighted with a black box. It shows a dropdown menu with 'My Consent Capture Flow' selected. The second section, labeled '2', is the 'Layout' component, also highlighted with a black box. It shows a dropdown menu with 'One Column' selected. Below the layout section, there is a section for 'recordId' with a text input field containing '{!Record.Id}'. A checkbox labeled 'Pass record ID into this variable' is checked. At the bottom, there is a section for 'Set Component Visibility' and a 'Filters' section with an 'Add Filter' button.

3

Save Activation...

Page > Flow

Flows don't run in the canvas so that they don't accidentally do something in your org, like create or delete records.

* Flow

My Consent Capture Flow

Layout

One Column

Optionally, enter values for these flow variables. Only variables that allow input access are supported.

recordId

{!Record.Id}

☒ Pass record ID into this variable

Set Component Visibility

Filters

+ Add Filter



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!

Contact



Ms. Babara Levy



 Follow

New Case

New Note

Submit for Approval



Title

SVP, Operations

Account Name

[Express Logistics and Transport](#)

Phone (2) ▼

(503) 421-7800

Email

b.levy@expressl&t.net

Contact Owner

 [Stephan Garcia](#)

Details

Related

News

Contact Owner

 [Stephan Garcia](#)

Name

Ms. Babara Levy

Account Name

[Express Logistics and Transport](#)

Title

Phone

(503) 421-7800

Home Phone

Mobile

(503) 421-5451

Other Phone

My Consent Capture Flow

 No Individual Object has been created for this record, please create one in order to manage their consent records. Select 'Next' to begin.

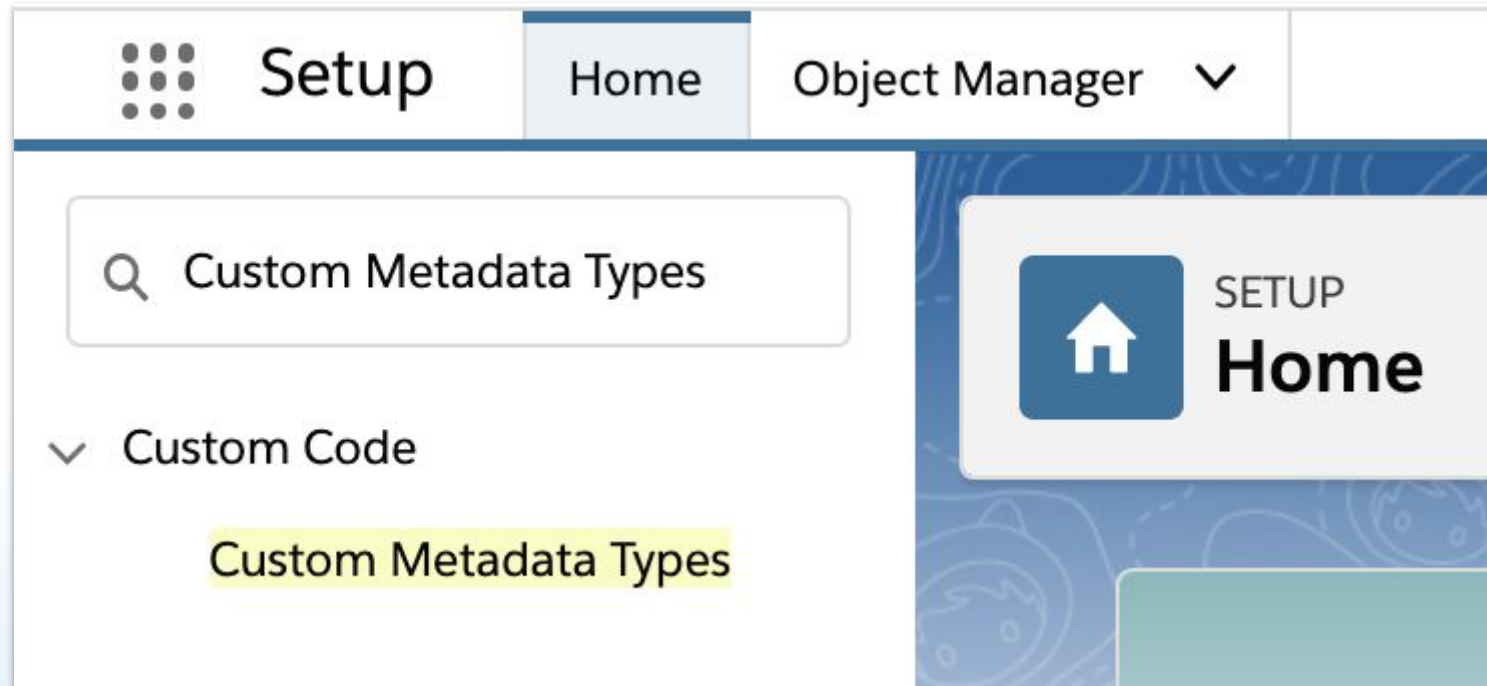
Next

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
Details Manage Records	<u>Consent Capture Utility</u>	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	<u>Email</u>	Email	concap
Edit Del	<u>Mailing Address</u>	Mailing_Address	concap
Edit Del	<u>Phone</u>	Phone	concap
Edit Del	<u>Social</u>	Social	concap
Edit Del	<u>Web</u>	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

Consent Capture Utility

Help for this Page ?

Consent Capture Utility Detail

EditDeleteClone

Label	Email	Protected Component	☐
Consent Capture Utility Name	Email	Namespace Prefix	concap
Setting Type	description		
Contact Point Consent	Email		
Output Value	You may or may not send email to this individual based on the following purposes		

EditDeleteClone

Last Modified By Stephan Garcia, 02/09/2019 11:39



> **Email**
You may or may not send email to this individual based on the following purposes

> **Phone**
You may or may not phone this individual based on the following purposes

> **Mailing Address**
You may or may not send post to this individual based on the following purposes

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

