

Consent Capture User Guide





Consent Capture Flow Template Overview



Introducing Consent Capture



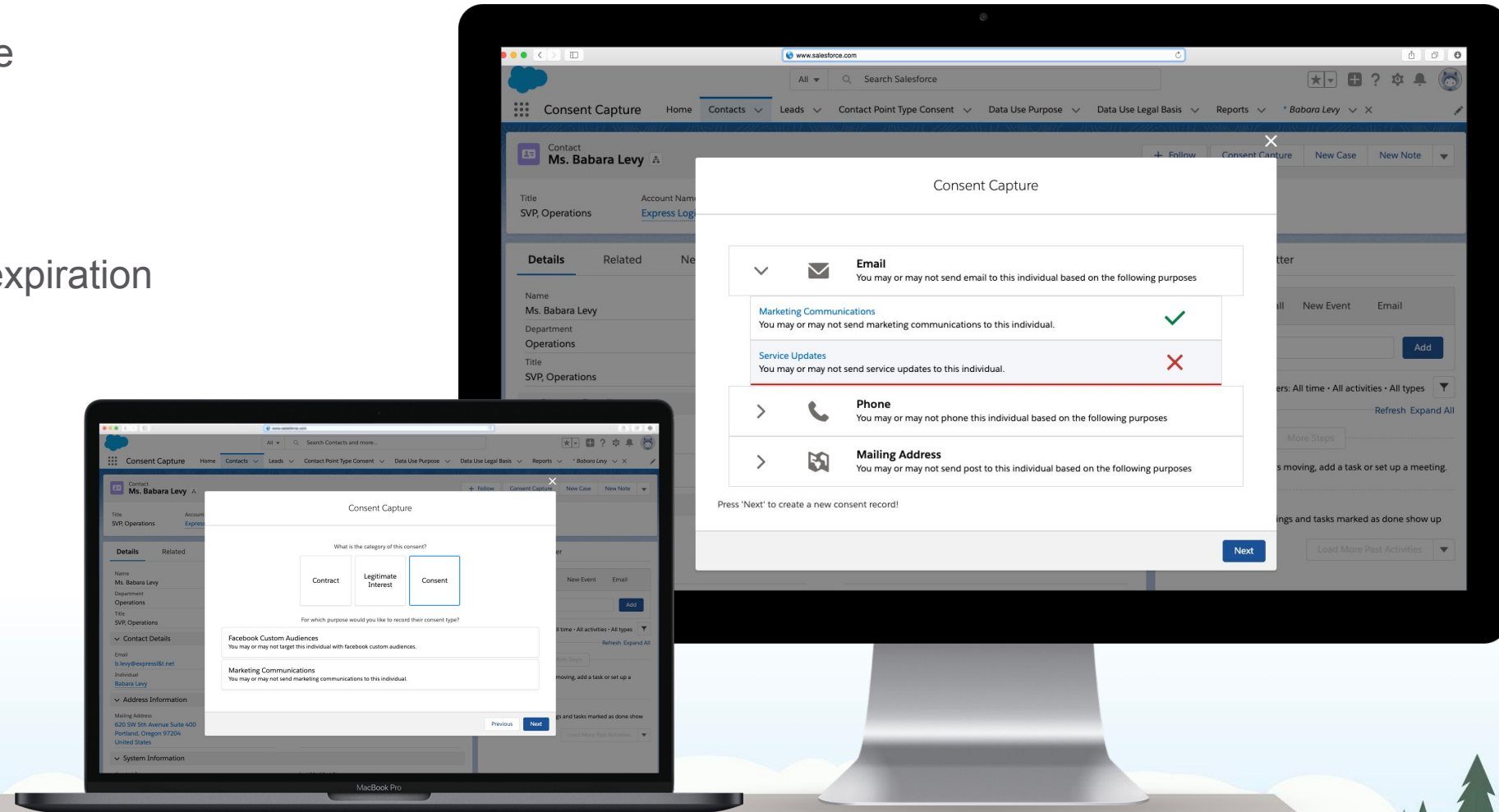
Create a consent process fit for your business

Fast & flexible flow template

View consent history

Enforce IT policy

Track consent retention & expiration



Consent Capture



Consent Capture is a flow template that includes a set of tools and utilities to help you quickly implement a basic consent management system on Salesforce!

Using the new privacy & data governance objects in Salesforce, Consent Capture will help you:

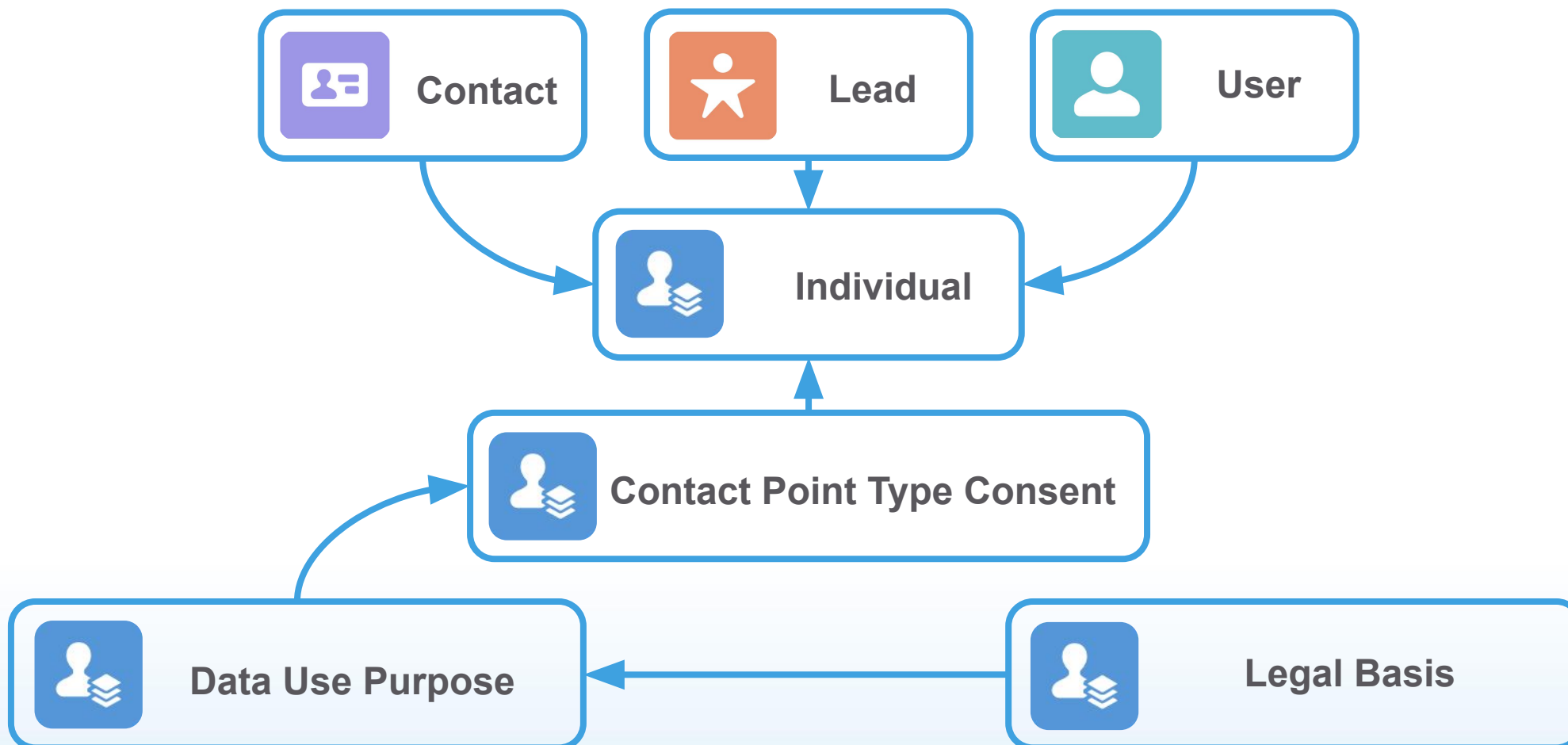
1. Build your legal & marketing teams consent process into Salesforce
2. Give your users access to view an individual's active and expired consent records
3. Create new consent records
4. Create a customized flow that fits your business needs



Privacy & Data Governance Objects

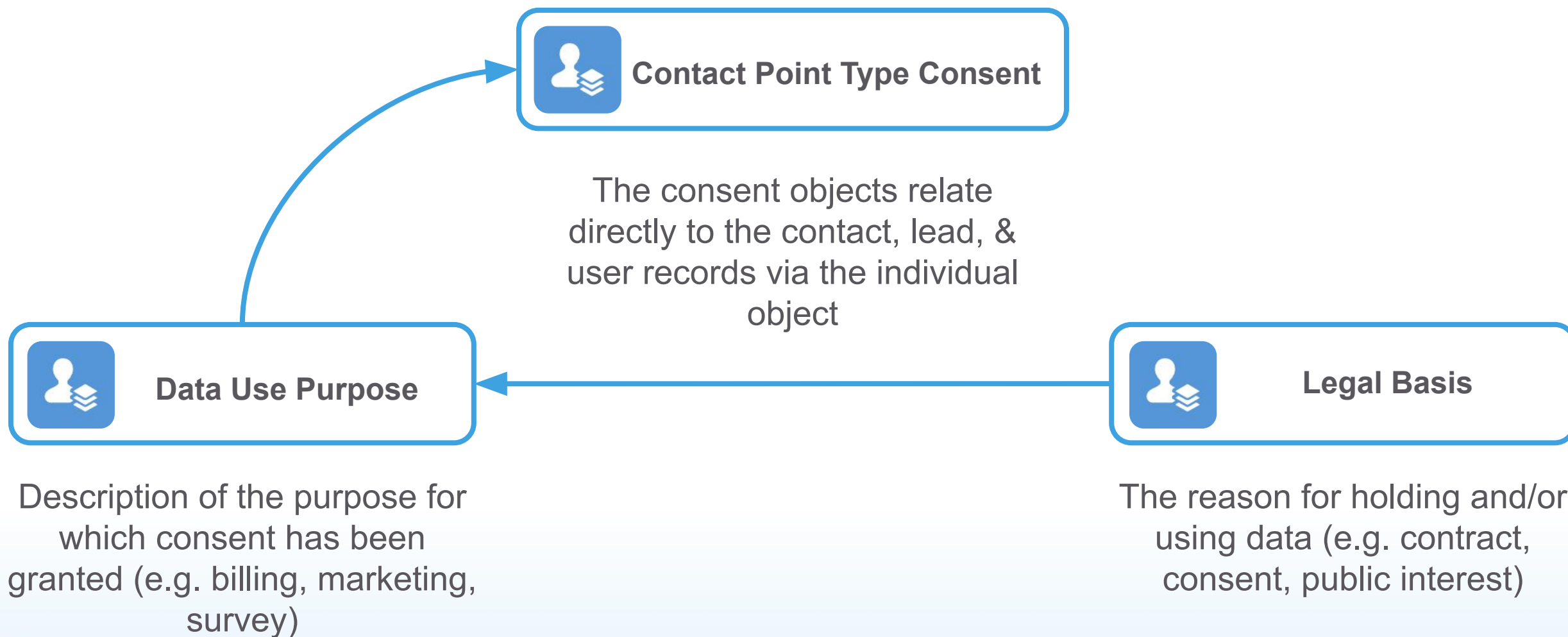


The consent objects relate directly to the contact, lead, & user records via the individual object



Salesforce documentation: [Store customers' data privacy preferences](#)

Privacy & Data Governance Objects



Salesforce Documentation: [Store customers' data privacy preferences](#)

Starting Instructions



Consent Capture gives you the ability to guide your users through creating consent records in Salesforce. Before they begin, you may give them a set of guidelines and instructions to ensure they are following corporate policy.

Consent Capture Template
View and Modify Consent Records
You have the ability to:

- View available data use purposes
- View expired and opt-out data use purposes
- Create contact consent records

Select Next to Begin

Next

Instructions

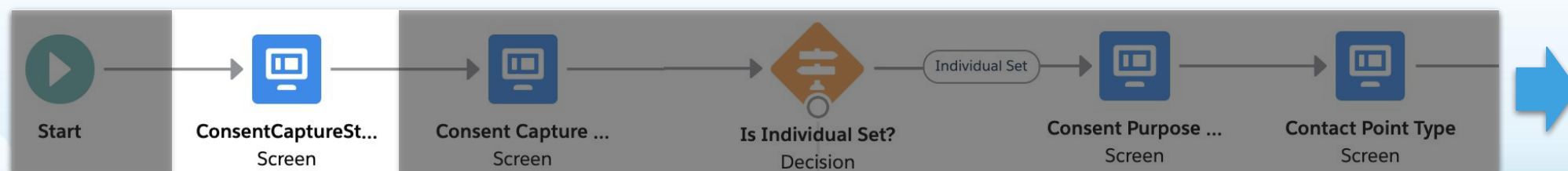
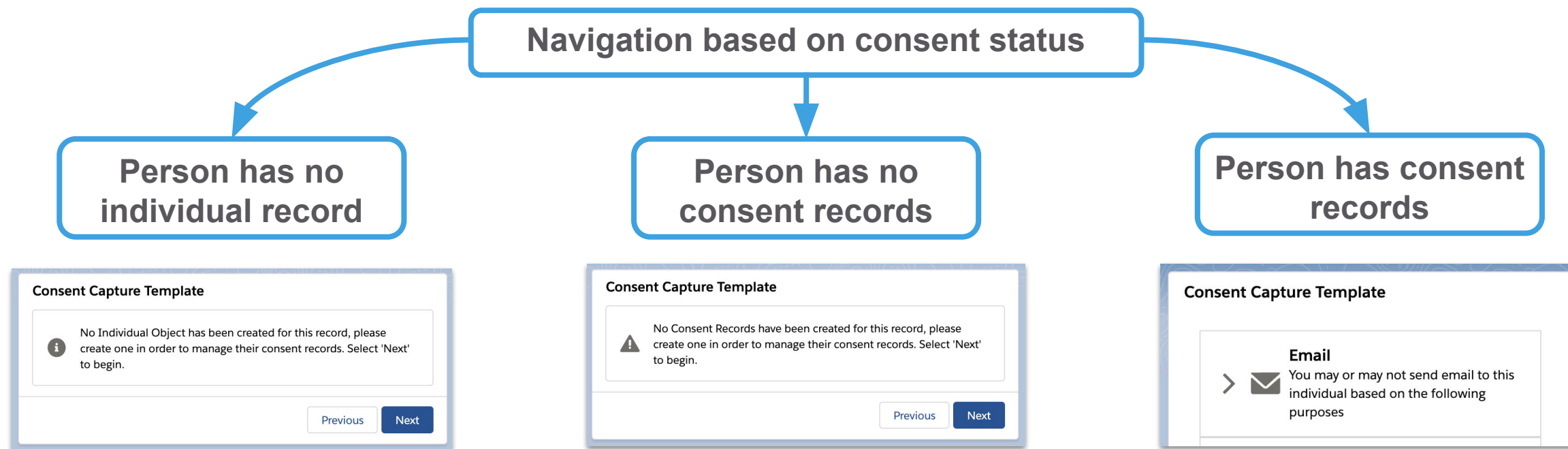
The instructions are fully customisable or removeable in the Flow Builder. They are a great way to align you users to your policies.



Capture Screen



The initial capture screen will determine the current state of the contacts consent



Capture Screen - Consent Overview



Consent Capture allows you to view the all of the current consent types associated to the individual who has the flow available on their page

Contact point consent type

The contact point consent types are aggregated against the records with the corresponding individual record.

Consent Capture Template

>		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

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Consent capture utilities

The descriptions are taken from the consent capture utilities custom metadata type



Capture Screen - Consent Overview Continued



Consent Capture Allows you to view the all of the current consent types associated to the individual who has the flow available on their page

Data Use Purpose

The data use purpose is gathered from the contact point type consent records associated to the individual

Email ✓ ✉ You may or may not send email to this individual based on the following purposes	
Linkedin Sales Navigator You my use their data with Linkedin Sales Navigator.	✗
Marketing Newsletter The individual may receive the marketing newsletter	✓
Facebook Custom Audiences You may upload their data to Facebook custom audiences.	✗
Phone > ☎ You may or may not phone this individual based on the following purposes	

Contact Point Type Status

The status is calculated based on the status of the contact point type consent field



Capture Screen - No Consent Records



If an contact or lead record is associated to an individual but does not have any consent records, they will first be prompt to create one

Consent Capture Template



No Consent Records have been created for this record, please create one in order to manage their consent records. Select 'Next' to begin.

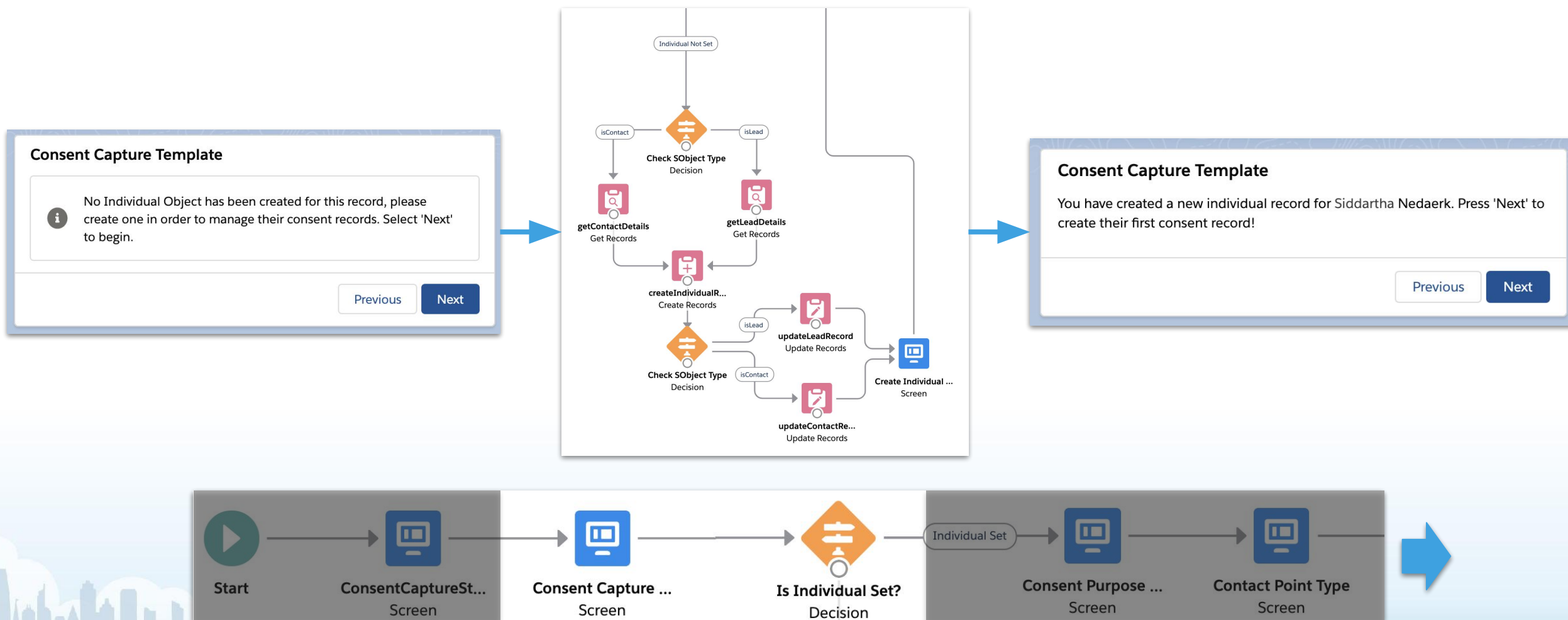
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Consent Capture Overview



An individual record is required in order to use the consent objects - the flow will automatically create a new individual and allow you to customize this process to your company policy



Consent Capture Overview



When capturing an individual's consent, you must first select the legal basis and then the data use purpose associated with the contact point type consent record

Legal Basis

The categories are selected from the available data use legal basis records that you've created in Salesforce

Consent Capture Template

What is the category of this consent?

Legitimate Interest **Contract** Consent

For which purpose would you like to record their consent type?

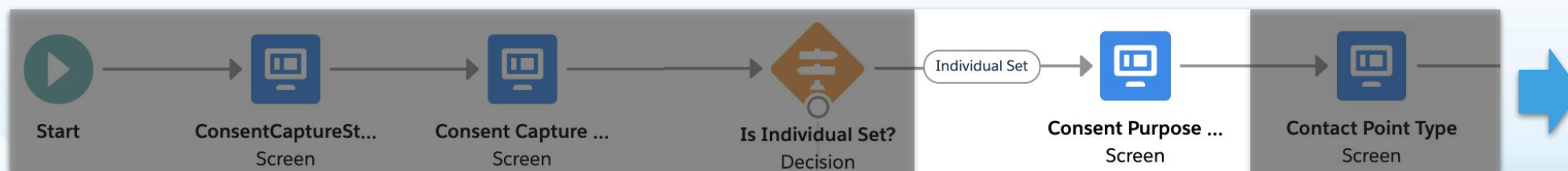
Service Updates
You may send service alerts to this customer via multiple channels.

Past Data Retention
You may retain past customer data for 7 years.

Previous **Next**

Data Use Purpose

The purposes are selected from the available records in Salesforce that have the selected legal basis associated



Consent Capture Overview



Each consent record must be for a specific channel of communication.

Contact Point Types

The types are selected from the picklist values on the contact point type consent object

Consent Capture Template

Which Consent Type would you like to Create?

Email

Phone

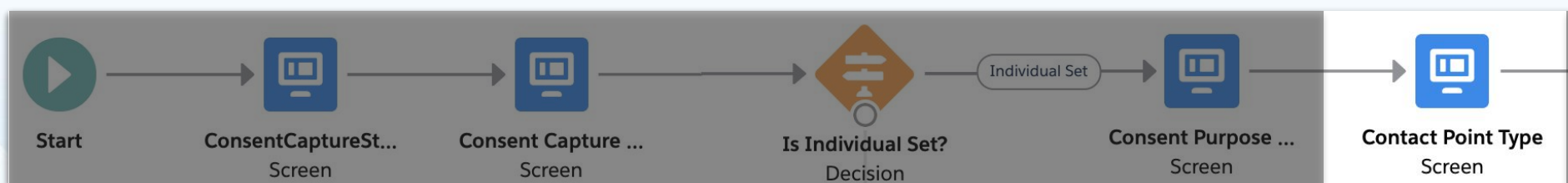
Web

Social

Mailing Address

Previous

Next



Consent Capture Overview



Once you have defined the purpose and channel of the consent record, you then can supply details around the length of time that the consent is valid and the level of awareness of the individual.

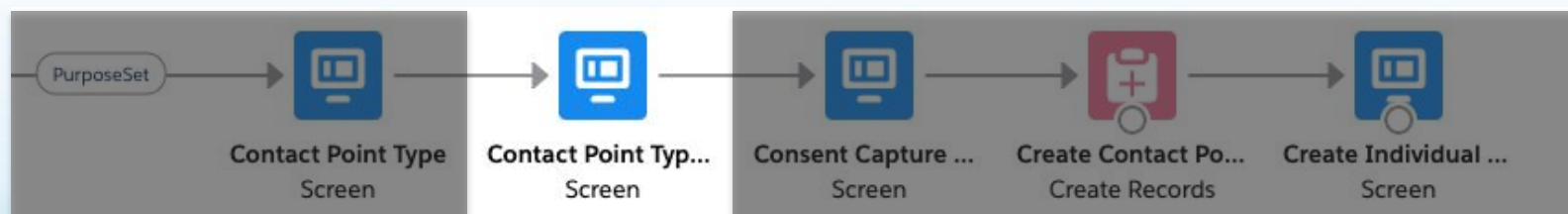
Effective To

Calculate the number of months that a consent record is valid

The screenshot shows a 'Consent Capture Flow Template' interface. It includes a slider for 'How long is this consent valid?' set to 20 months, and four buttons for 'How aware is the individual of this consent?': 'Not Seen', 'Seen', 'Opt In', and 'Opt Out'. Navigation buttons 'Previous' and 'Next' are at the bottom.

Consent Status

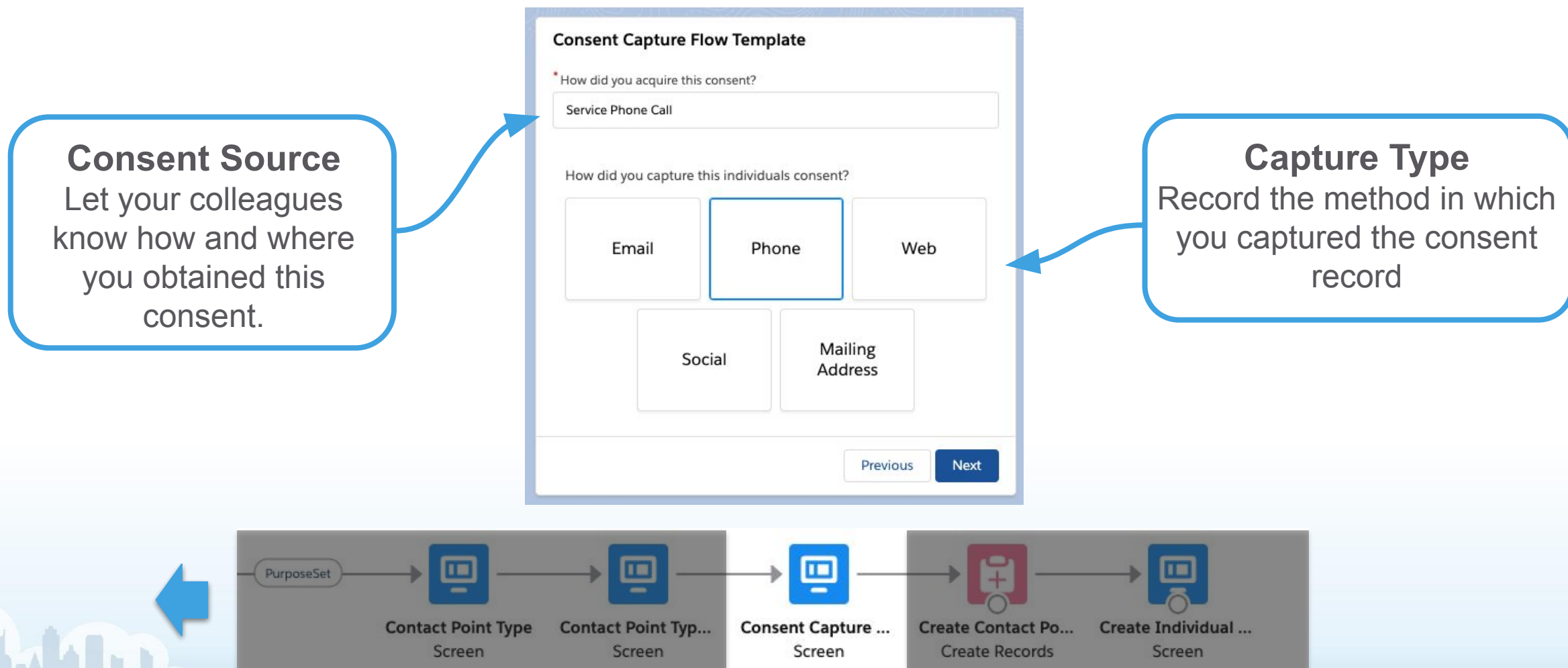
Track the level of visibility that an individual has had to this consent record



Consent Capture Overview



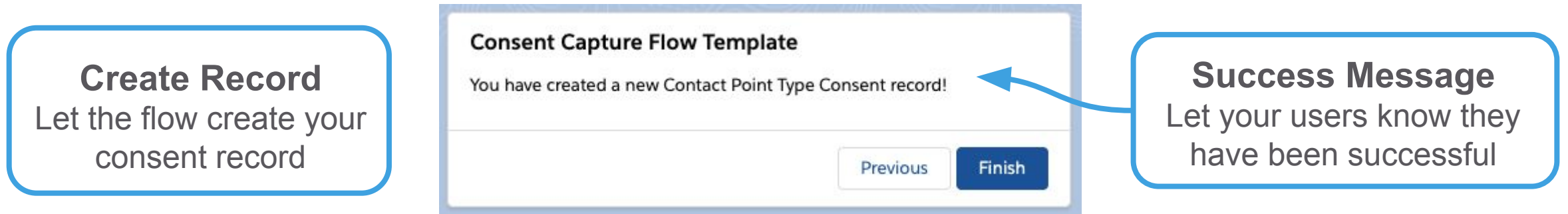
Track the details around how you captured and via which source you captured the information.



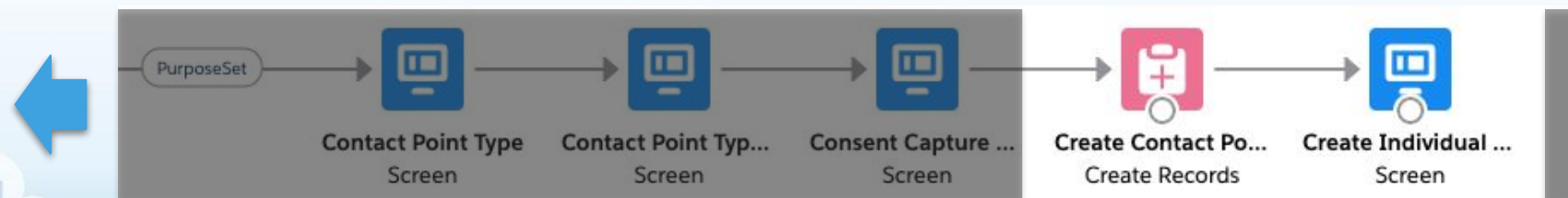
Consent Capture Overview



Once you have completed filling in the details of the consent, flow will create the record in Salesforce. You can tailor this part of the flow to your business process and customise a message to your users.



Completed!



thank you

