



GDPR USER GUIDE

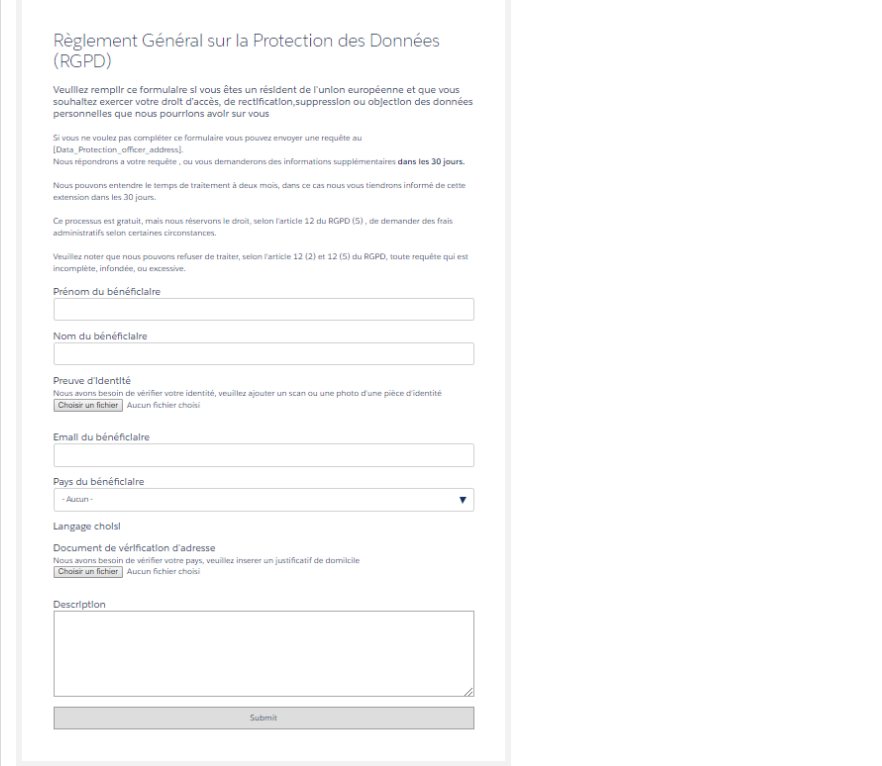
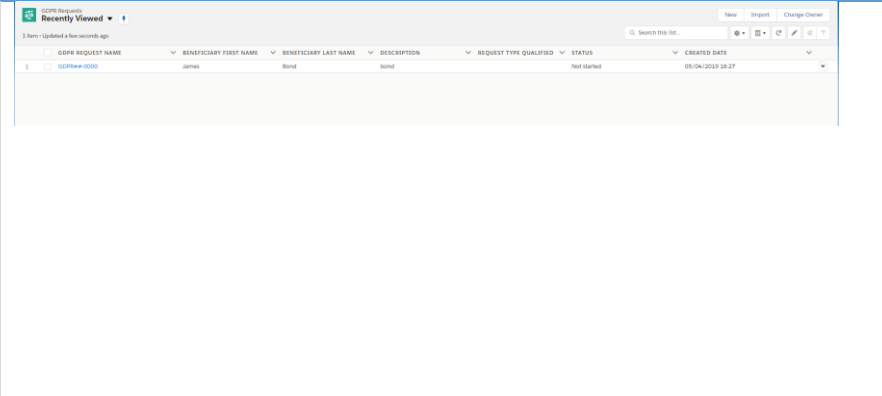
MARCH 2019

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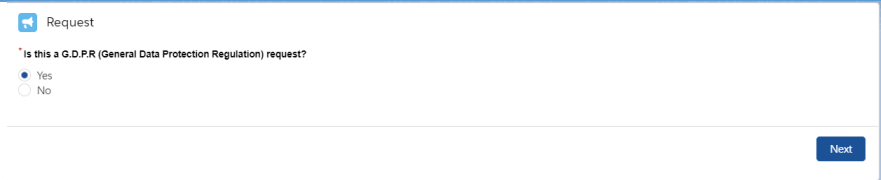
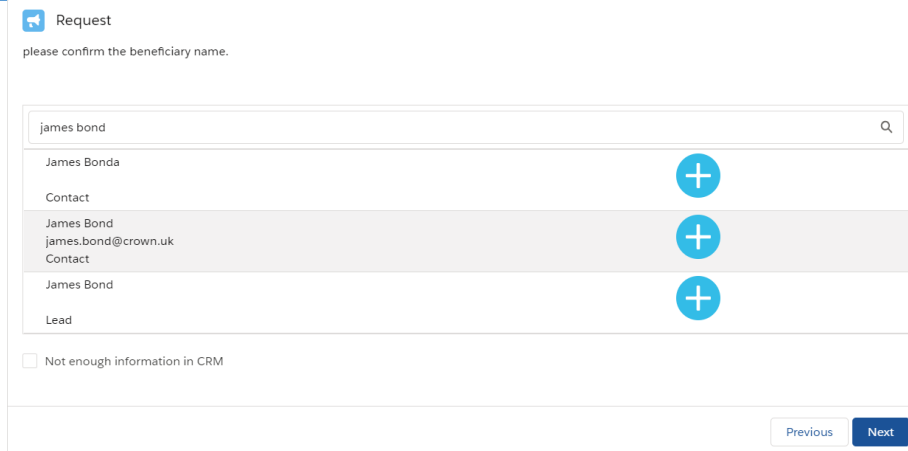
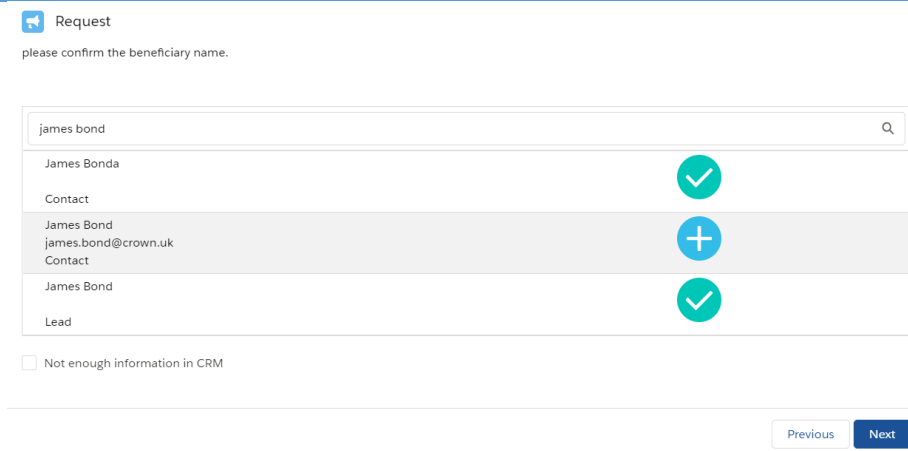
GDPR Request creation/qualification

How to create/qualify a GDPR Request

#	Description	Screenshot
1	<p>Most of you request will be created using the Web Form, you can find the URL in Setup -> Sites. All the fields there a mandatory.</p>	
2	<p>You can also Create a request from scratch Go to GDPR_Request tab a click "New"</p>	

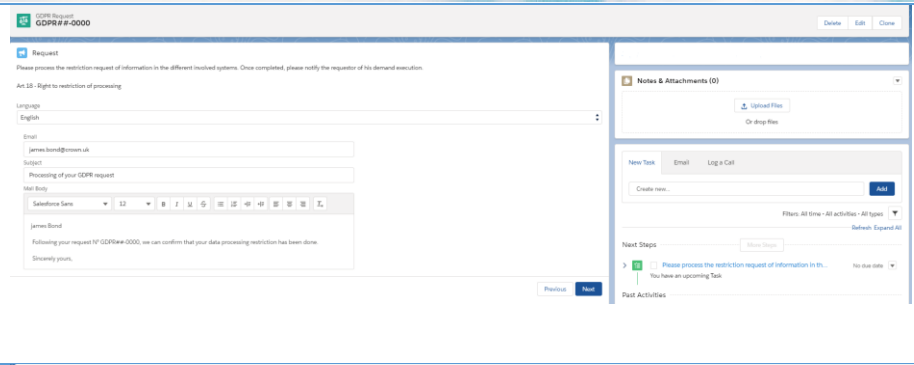
Process the Request

Lead your process to the end!

#	Description	Screenshot
1	<p>Qualify your request: Is this a GDPR Request?</p> <ul style="list-style-type: none"> Yes, if you consider it as a GDPR request (e.g: "I would like my data please"). No, (e.g: I would like to talk with the CEO about a fishing trip.) 	
2	<p>Qualify your request: Enter/Confirm beneficiary name. That will search for it in the database (This is a full text Research looking on Contact & Lead First and last name). You can select only One Contact and one Lead at the time. Click the Plus sign to select a record. (see below).</p>	
3	<p>After selecting a Record (Lead or contact) The sign changes. If you click on the Sign again it will unselect the current record. Also if you click on another record of same type (e.g: another contact) it will select the last one and unselect the other one selected. When your selection is done click 'Next'</p>	

	<div data-bbox="690 199 1583 640"> <p>1 Request please confirm the beneficiary name.</p> <input type="text" value="james bond"/> <ul style="list-style-type: none"> James Bonda Contact James Bond james.bond@crowm.uk Contact James Bond Lead <input type="checkbox"/> Not enough information in CRM <p style="text-align: right;">Previous Next</p> </div>
<p>4 If you can't find any contact/lead with this name select "Not enough information in CRM" and click 'Next'. This will lead the flow to another path that we will see later in the user guide.</p>	<div data-bbox="690 667 1583 919"> <p>1 Request please confirm the beneficiary name.</p> <input type="text" value="Bad guy"/> <input checked="" type="checkbox"/> Not enough information in CRM <p style="text-align: right;">Previous Next</p> </div>
<p>5 Qualify your request: Choose the type of request between the six different types. If not, enough information select "Unidentified request"</p>	<div data-bbox="690 955 1583 1186"> <p>1 Request</p> <p>*Please select the GDPR article which corresponds to your request:</p> <ul style="list-style-type: none"> <input type="radio"/> Art.15 - Right of access by the data subject <input type="radio"/> Art.16 - Right to rectification <input type="radio"/> Art.17 - Right to erasure ('right to be forgotten') <input checked="" type="radio"/> Art.18 - Right to restriction of processing <input type="radio"/> Art.20 - Right to data portability <input type="radio"/> Art.21 - Right to object <input type="radio"/> Unidentified request <p style="text-align: right;">Previous Next</p> </div>
<p>6 Qualify your request: Is the request legitimate?</p> <ul style="list-style-type: none"> • Yes, if you consider it as legitimate request ("I would you to stop using my datas") • No, (e.g: "I would like my data send by homing pigeon on a external drive of 4oTo") 	<div data-bbox="690 1213 1583 1381"> <p>1 Request</p> <p>*Is the request legitimate? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p style="text-align: right;">Previous Next</p> </div>

7 In our example this is manual action on **your side**.
 Meaning that you must take action so the data of the requestor are not used anymore in some of you processes.
 For that **a task is created assigned to you** while an email is generated based on a modifiable template.
 When your task is complete, just click next and the Requestor will receive that email.



GDPR Request
GDPR##-0000

Request

Please process the restriction request of information in the different linked systems. Once completed, please notify the requestor of its demand execution.

An ID - Right to restriction of processing

Language: English

Email: james.bond@ovos.uk

Subject: Processing of your GDPR request

Mail Body

Rich text editor content:

James Bond
Following your request for GDPR##-0000, we can confirm that your data processing restriction has been done.
Sincerely yours,

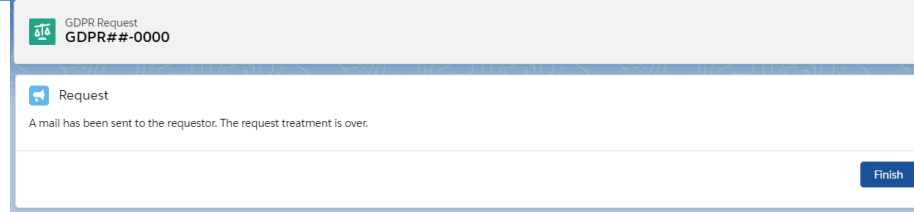
Buttons: Previous, Next

Notes & Attachments (0)

Next Steps

Task: Please process the restriction request of information in th...
Status: You have an upcoming Task

8 And it's done! The flow is over, clicking finish will close the flow for good.
 The record will still be accessible.



GDPR Request
GDPR##-0000

Request

A mail has been sent to the requestor. The request treatment is over.

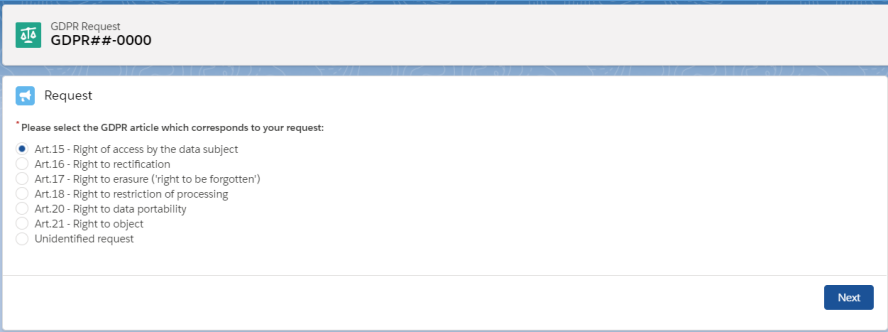
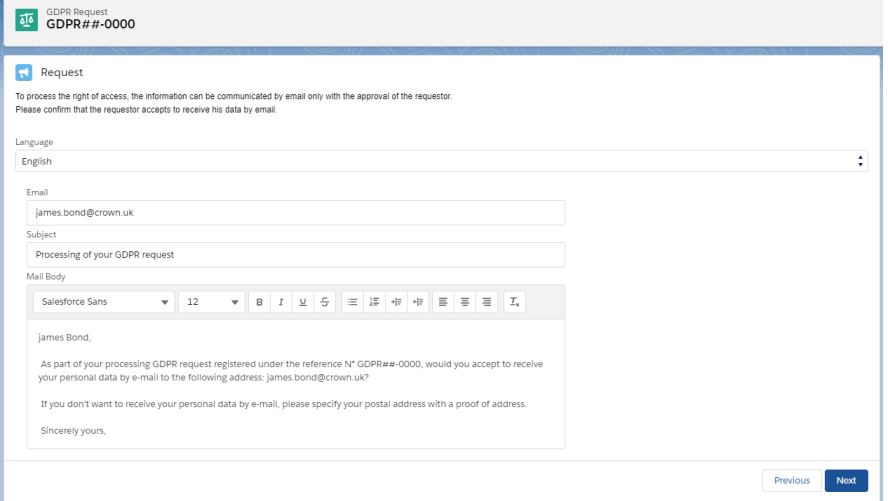
Button: Finish

Other examples

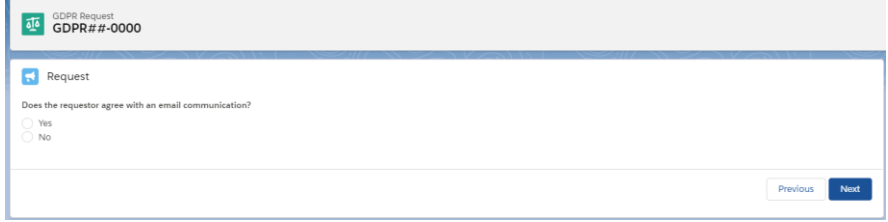
The flow is very complete and has many outputs, we won't be exhaustive here, but basically there is 6 treatment possible. For **Rectification, Restriction (seen above) and Object (3/6)** the process is quite similar as we can't act on your processes and this is a manual action from **your side**. The flow will just guide you through the characterization and the answer to the requestor.

For the three other options we will see a bit here:

- Right of access and portability:

#	Description	Screenshot
1	<p>Right of access and portability are treated the same way here. In both case we gather the data put in the configuration and generate a .csv file.</p>	
2	<p>But first we need to ask the requestor if he is OK to receive his personal data by email. Same as before, an email is generated and pre-filled. Click next to send it.</p>	

3 Then we wait for the answer of the requestor.
If he says no, the .csv file will still be generated but it will have to be sent by postal mail after being printed.



GDPR Request
GDPR##-0000

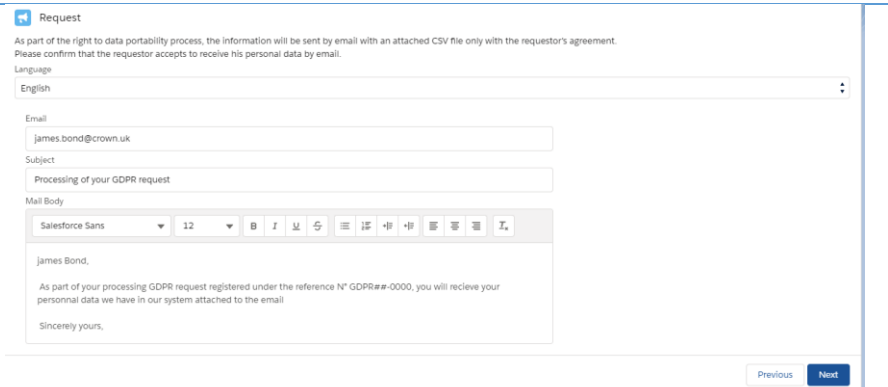
Request

Does the requestor agree with an email communication?

Yes
 No

Previous Next

4 Let's assume the requestor says 'Yes'.
Again an email is generated and clicking next will send it to the requestor with the personal information attached as a .csv file.



Request

As part of the right to data portability process, the information will be sent by email with an attached CSV file only with the requestor's agreement. Please confirm that the requestor accepts to receive his personal data by email.

Language: English

Email: james.bond@crowm.uk

Subject: Processing of your GDPR request

Mail Body

Salesforce Sans 12 B I U


James Bond,

As part of your processing GDPR request registered under the reference N° GDPR##-0000, you will receive your personal data we have in our system attached to the email

Sincerely yours,

Previous Next

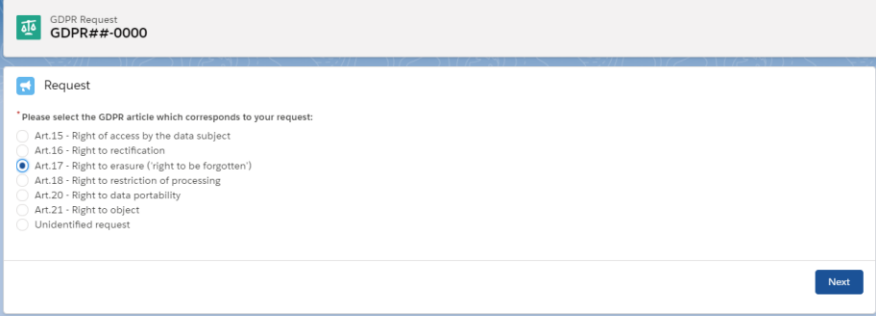

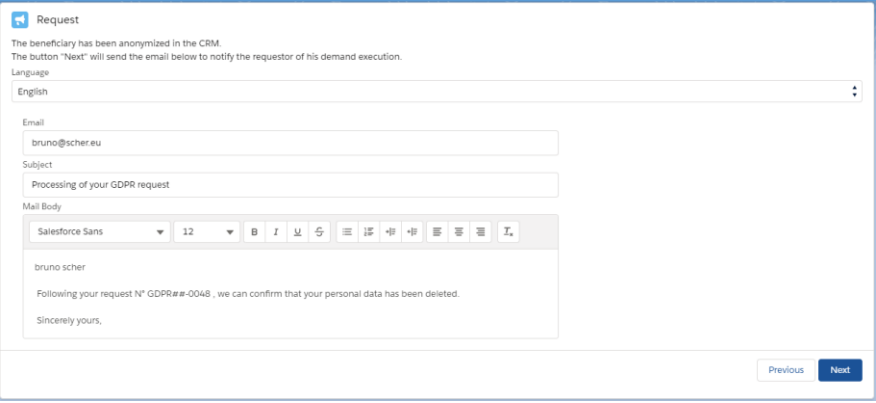
5 The .csv file is linked to the request and has been sent by email. The flow is over.



Request

The request treatment is finished.

- Right to be forgotten:

#	Description	Screenshot
1	<p>Right to be forgotten will replace all personals data by generic datas and a unique random string after those.</p> <p>Generic String: 'Forgotten-' + random string (10 character) + DateTime now.</p> <p>Generic date: 01/01/1990</p> <p>Generic Phone: 0987654321</p> <p>Generic Email: For@For.For- + Random string(10 characters) + DateTime now</p>	
2	<p>Confirmation screen, and reminder if the beneficiary has data in other systems aswell. Clicking next will anonymize the contact/lead.</p>	
3	<p>The beneficiary has been anonymized. Click next to send a confirmation Email.</p>	

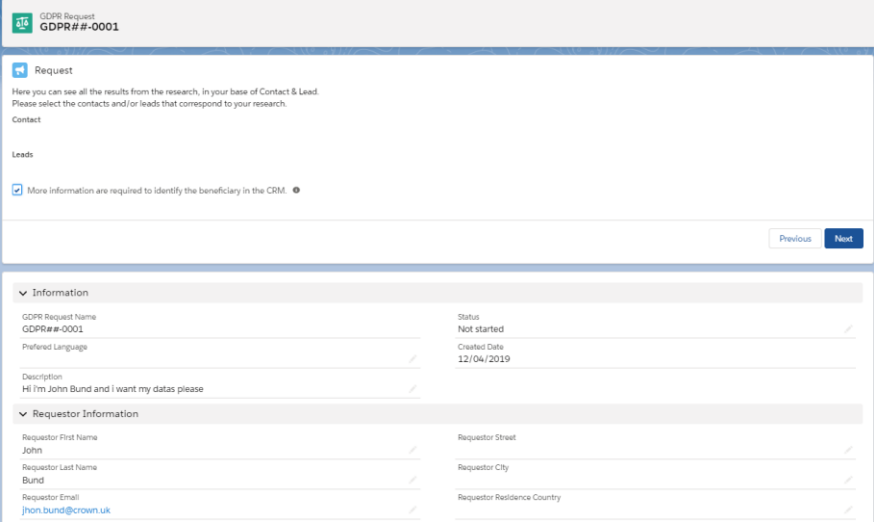
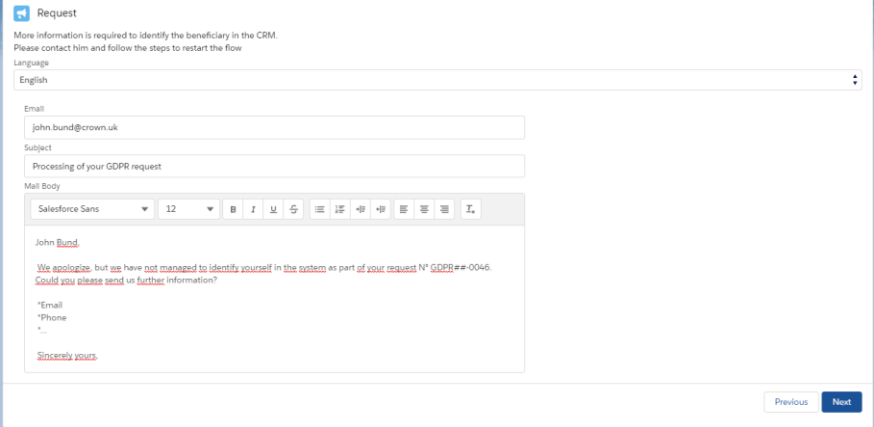
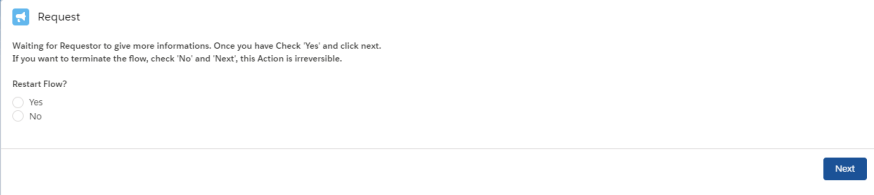
4 The flow is over.

Request
The request treatment is finished.

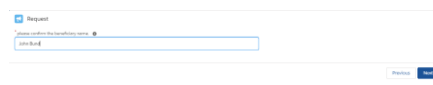
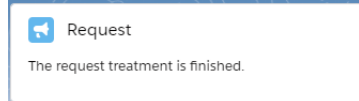
Treatment with no Email, not gdpr, not legitimate, not found, ect...

Here we will see some of the alternative's paths for the flow:

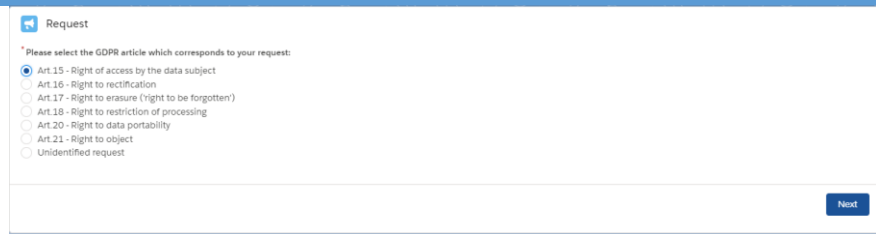

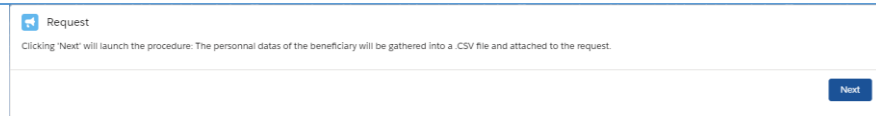
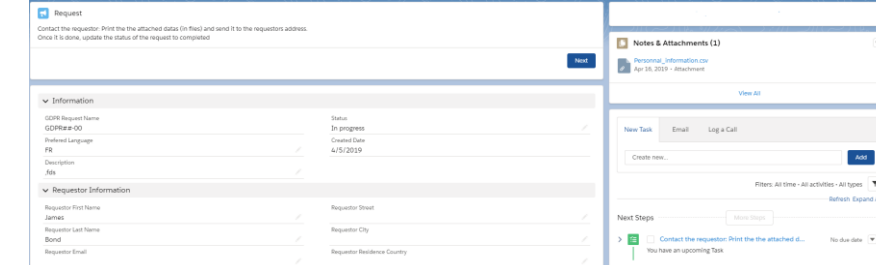
- Not found in CRM:

#	Description	Screenshot
1	Here the request is in the name of John Bund. We don't have him in our CRM. Check the "More information is required to identify the beneficiary in the CRM." checkbox. Click "Next".	
2	A contact email for more information is displayed and clicking next will send the email and pause the flow on the next step, waiting for more information from the requestor	
3	The flow is paused to this screen until you receive return from the requestor. Once you have more information check "Yes" and click "Next". If you check "No" and "Next" (No answer) the flow will terminate.	

4 Restarting the flow will bring you back to the screen where you can put a different Name for the research (Left screenshot). 'No' will bring you to the end of the flow (Right screenshot).

There are many loops and pauses, and the flow guides you towards every step. Now let's see a last example when the requestor or beneficiary have no Email. This can happen if the request is done manually after receiving a postal request.

#	Description	Screenshot
1	Let's try 'Right of access'	
2	Assuming the request is legitimate	
3	Here no mails are generated, as we can't communicate using email.	
4	Once on this screen the data have been gathered and a task has been created. You WILL need to refresh your page to see the task and the attachment.	

- | | |
|---|--|
| <p>5 From there, you can print the .CSV file (format it if necessary) and send it to the postal address of the requestor. Once it is done don't forget to pass the Task status to completed and the request status to completed</p> | |
|---|--|

All the paths in the flow have this alternative if the request is without Email. (Specific screens and task creation).It is a bit more complicated but remember that it won't happen very often as the email is mandatory on the web form. The only way is to receive a postal mail for a GDPR Request.