

Implementing GDPR-compliant

Double Opt-In for Email Subscriptions

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General Data Protection Regulation - Overview:

The General Data Protection Regulation, also known as GDPR, is a new data privacy law introduced by the European Union. The law came into practice on May 25, 2018.

GDPR Basic Rules

The rules basically apply to anyone who makes use of personal data such as names, email addresses and other personal information.

Anyone who utilizes or processes the data will be accountable/responsible for the data being used.

Companies or individuals processing the data must comply in a way that is lawful, transparent, fair and also only for the purpose it actually got.

Data can only be used time limited and it must be processed securely.

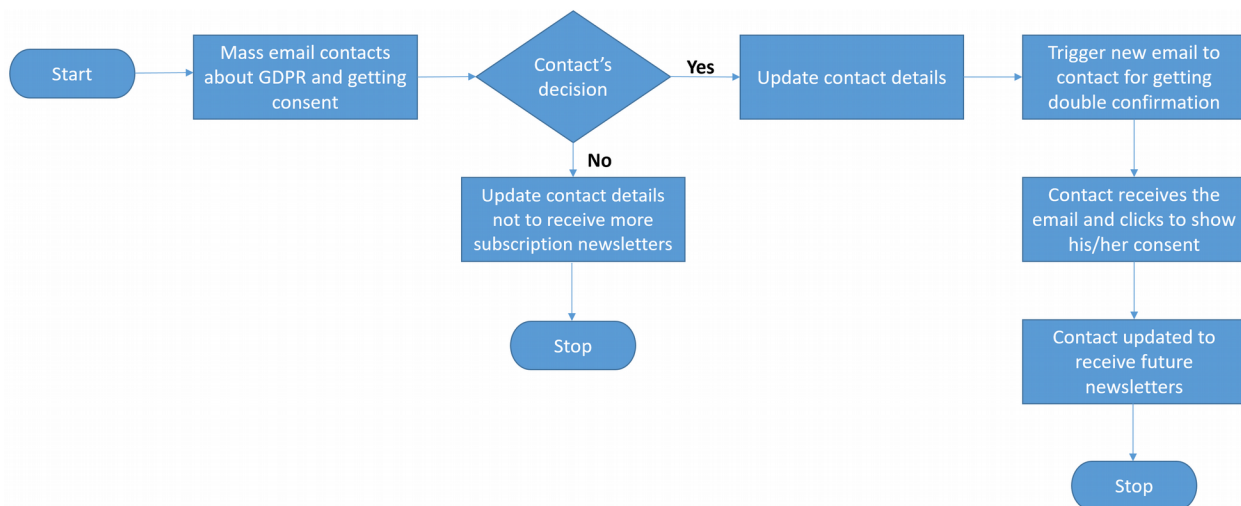
The Law is unbounded, which means that anyone can be questioned regardless of location or even if they are not inside an EU state.

Firms or individuals who are violating the law will be fined up to €20 million (\$24m) or 4% of global revenue, whichever is higher.

Salesforce - GDPR:

Multiple changes need to be considered/implemented regarding usage of personal data in salesforce where the details such as Name, Addresses, Phone Numbers, Email addresses are stored in Leads, Accounts and Contacts. This article mainly focuses on informing the contacts by sending them emails about the new GDPR law, and getting consent from them regarding the usage of personal data.

Flow:



Salesforce Implementation

The following components of Salesforce will be used to implement the complete process.

- 1) Custom object/ fields
- 2) Process builder
- 3) Site
- 4) Email alert
- 5) Email template
- 6) Apex class
- 7) Visualforce page

Custom Object:

A custom object named “Utility” will be created along with the following fields as shown below. This will be used to update the contact information when the user clicks on the link from the email.

Field Label	API Name	Data Type
Company	Company__c	Text(200)
Contact	Contact__c	Lookup(Contact)
Contact Id	Contact_Id__c	Text(20) (External ID) (Unique Case Insensitive)
Do Not Call	DoNotCall__c	Checkbox
Email	Email__c	Email
Email Opt Out	EmailOptOut__c	Checkbox
Email Updated On	EmailUpdatedOn__c	Date/Time
First Name	FirstName__c	Text(40)
Last Name	LastName__c	Text(80)
Phone	Phone__c	Phone
Phone Updated On	PhoneUpdatedOn__c	Date/Time
Salutation	Salutation__c	Picklist
Title	Title__c	Text(128)
Update Flag	Update_Flag__c	Picklist

Process Builder:

The process builder initiates the process whenever there is an update in the “Utility” object to update received contact details. Please find below the complete setup:

Step 1:

Expand All Collapse All View All Processes Clone View Properties Deactivate

Choose Object and Specify When to Start the Process

Object * Utility

Start the process *
 only when a record is created
 when a record is created or edited

> Advanced

Step 2:

Define Criteria for this Action Group

Criteria Name * Check DoubleOptIn

Criteria for Executing Actions *
 Conditions are met
 Formula evaluates to true
 No criteria—just execute the actions!

Set Conditions

Field *	Operator *	Type *	Value *
1 [Unsubscribe_... Q	Equals	Picklist	Double Opt In

Step 3:

Update Records

Field *	Type *	Value *
Company	Field Reference	[Unsubscribe_UTILITY_... Q
Do Not Call	Field Reference	[Unsubscribe_UTILITY_... Q
Email	Field Reference	[Unsubscribe_UTILITY_... Q
EmailOptOut Flag	Field Reference	[Unsubscribe_UTILITY_... Q
Email Updated On	Field Reference	[Unsubscribe_UTILITY_... Q
First Name	Field Reference	[Unsubscribe_UTILITY_... Q
Last Name	Field Reference	[Unsubscribe_UTILITY_... Q
Business Phone	Field Reference	[Unsubscribe_UTILITY_... Q
Phone Updated on	Field Reference	[Unsubscribe_UTILITY_... Q
Title	Field Reference	[Unsubscribe_UTILITY_... Q

Site:

Site1:

Create a site that allows to update the contact information. When the user receives the email and clicks on the button navigate to this site. Once the user updates the information/gives consent to receive newsletters in the future, all the information will be saved directly to Salesforce. The site must be configured as below.

Site Detail		Edit	Public Access Settings	Login Settings	URL Redirects	Deactivate	
Site Label	Double Opt In					Site Name	DoubleOptIn
Site Description						Site Contact	Amulhan M
Active	<input checked="" type="checkbox"/>					Login	Not Allowed
Active Site Home Page	mailing [Preview]					Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]					Site Robots.txt	
Site Template	SiteTemplate [Preview]					Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code						URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (recommended)					Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/> i
Upgrade all requests to HTTPS	<input checked="" type="checkbox"/> i					Enable Content Sniffing Protection	<input checked="" type="checkbox"/> i
Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/> i					Referrer URL Protection	<input checked="" type="checkbox"/> i
Guest Access to the Support API	<input type="checkbox"/> i						
Created By	Amulhan M , 20.09.2018 08:13					Last Modified By	Amulhan M , 24.09.2018 09:21
		Edit	Public Access Settings	Login Settings	URL Redirects	Deactivate	

For the site user profile, proper permission to utility objects shall be given as below. Also the Class and visualforce pages need to be given access to the profile.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Utilities	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Site 2

The site below helps Salesforce to get the double confirmation from the contact and redirects to the company's web site

Site Details Help for this Page

Double Opt In

[Back to List: Sites](#)

Site Detail Edit Public Access Settings Login Settings URL Redirects Deactivate

Site Label	Double Opt In	Site Name	DoubleOptIn
Site Description	Active <input checked="" type="checkbox"/>	Site Contact	Login Not Allowed
Active Site Home Page	mailing [Preview]	Site Favorite Icon	
Inactive Site Home Page	InMaintenance [Preview]	Site Robots.txt	
Site Template	SiteTemplate [Preview]	Enable Feeds	<input type="checkbox"/>
Analytics Tracking Code		URL Rewriter Class	
Clickjack Protection Level	Allow framing by the same origin only (Recommended)	Require Secure Connections (HTTPS)	<input checked="" type="checkbox"/>
Lightning Features for Guest Users	<input checked="" type="checkbox"/>	Upgrade all requests to HTTPS	<input checked="" type="checkbox"/>
Enable Content Sniffing Protection	<input checked="" type="checkbox"/>	Enable Browser Cross Site Scripting Protection	<input checked="" type="checkbox"/>
Referrer URL Protection	<input checked="" type="checkbox"/>	Guest Access to the Support API	<input type="checkbox"/>

Edit Public Access Settings Login Settings URL Redirects Deactivate

Provide access to the contact for above site's profile as below.

	Basic Access				Data Administration	
	Read	Create	Edit	Delete	View All	Modify All
Contacts	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>				

VF Page :

Below is a sample code snippet to get the Contact information

```
<table style="margin: 0 auto; border-spacing: 15px;">
  <apex:variable var="c" value="{!RowList[0]}" />
<!--<tr>
  <td>
    Anrede<br />
    <apex:inputText value="{!c.Salutation}"/><br />
  </td>
</tr-->
<tr>-->
<tr>
  <td>
    Vorname<br />
    <apex:inputText value="{!c.FirstName}"/><br />
  </td>
  <td>
    Nachname<br />
    <apex:inputText value="{!c.LastName}"/><br />
  </td>
</tr>
```

```

</tr>
<tr>
  <td>
    Unternehmen<br />
    <apex:inputText value="{!c.Company}"/><br />
  </td>
  <td>
    Position<br />
    <apex:inputText value="{!c.Title}"/><br />
  </td>
</tr>
<tr>
  <td>
    Telefonnummer<br />
    <apex:inputText value="{!c.Phone}"/><br />
  </td>
  <td>
    E-Mail-Adresse<br />
    <apex:inputText value="{!c.Email}"/><br />
  </td>
</tr>
<tr>
<td colspan="2">
  Ich erlaube der Ihre GmbH Name mich auf den folgenden Kontaktwegen zu
  innovativen Produkten, Veranstaltungen und Erfahrungsberichten zu informieren:<br />
</td>
</tr>
<tr>
  <td colspan="2">
    <apex:inputCheckbox value="{!c.optPhone}" id="Telefon"/>
    <apex:outputLabel value="Telefon" for="Telefon"/><br />
    <apex:inputCheckbox value="{!c.optEmail}" id="E-mail"/>
    <apex:outputLabel value="Elektronischer Post, wie z. B. E-Mail, App-Mitteilung
    oder SMS" for="E-mail"/>
    <br /><br />
  </td>
</tr>
<tr><td colspan="2">
  <apex:commandButton action="{!updateContact}" value="Einverstanden"
  onclick="alert('Vielen Dank für Ihre Angaben.');" /><br /><br />
  <!--<input type="submit" name="" id="" value="Mailing weiter abonnieren" onclick="{!
  updateContact}"/><br /><br />-->
</td></tr>
</table>

```

Apex Class:

The class below will be responsible for getting updated contact information from the site and save the same to Salesforce.

```

public without sharing class DoubleOptIn {
    /*Declare Variables*/
    public List<conWrapper> RowList {get; set;}
    public List<contact> contactId;

    public DoubleOptIn(){
        RowList = new List<conWrapper>();
        conWrapper tr;
        contactId = [SELECT Id, Name, Salutation, FirstName, LastName, Title, Phone, Email, DoNotCall, HasOptedOutOfEmail, Company__c
                    FROM Contact
                    WHERE Id = :ApexPages.currentPage().getParameters().get('id') LIMIT 1];
        /*Building the List of conWrappers*/
        /*Fetch the Contact and then build the List*/
        for(Contact con : contactId){
            tr = new conWrapper();
            tr.ConId = con.id;
            tr.LastName = con.LastName;
            tr.Phone = con.Phone;
            tr.Company = con.Company__c;
            //tr.Salutation = con.Salutation;
            tr.FirstName = con.FirstName;
            tr.Title = con.Title;
            tr.Email = con.Email;
            /*Add the conWrapper to the List then and there*/
            RowList.add(tr);
        }
    }

    public PageReference updateContact() {
        Unsubscribe_Utility__c u = new Unsubscribe_Utility__c();
        u.Contact__c = RowList[0].ConId;
        u.Contact_Id__c = RowList[0].ConId;
        //u.Salutation__c = RowList[0].Salutation;
        u.FirstName__c = RowList[0].FirstName;
        u.LastName__c = RowList[0].LastName;
        u.Company__c = RowList[0].Company;
        u.Title__c = RowList[0].Title;
        u.Phone__c = RowList[0].Phone;
        u.Email__c = RowList[0].Email;
        u.EmailUpdatedOn__c = System.now();
        u.PhoneUpdatedOn__c = System.now();
    }
}

```



```
    u.Update_Flag__c = 'Double Opt In';
    if (RowList[0].optEmail!=null){if (RowList[0].optEmail){u.EmailOptOut__c = false;} else {u.EmailOptOut__c = true;}}
    if (RowList[0].optPhone!=null){if (RowList[0].optPhone){u.DoNotCall__c = false;} else {u.DoNotCall__c = true;}}
    upsert u Contact_Id__c;
    PageReference pageRef = new PageReference('https://optanium.com/');
    return pageRef;
}
public PageReference createTask(){
    system.debug('Entered task creation');
    String userId = UserInfo.getUserId();
    Task t = new Task();
    t.OwnerId = userId;
    t.Subject = 'Mass Email-DSGVO';
    t.Status = 'Completed';
    t.Priority = 'Normal';
    t.ActivityDate = date.parse(date.today().format());
    t.Whold = contactId[0].Id;
    insert t;
    system.debug('Entered task creation' + t);
    return null;
}
public class conWrapper{
    public String ConId { get; set; }
    public String Email { get; set; }
    public String Phone { get; set; }
    public String Title { get; set; }
    public String Company { get; set; }
    public String LastName { get; set; }
    public String FirstName { get; set; }
    //public String Salutation { get; set; }
    public boolean optEmail{get;set;}
    public boolean optPhone{get;set;}
}
}
```

VF Page 2:

Page to redirect to the company site after clicking the double confirmation link from the email sent to the contact.

```
<apex:page sidebar="false" showHeader="false" controller="SubscribeEmails" action="{! ProcessContact}">
</apex:page>
```

Apex Class :


```
public without sharing class SubscribeEmails{
    public Id conld{get;set;}
    public string templateName{get;set;}

    public SubscribeEmails(){
        conld = apexpages.currentPage().getParameters().get('conld');
        templateName = apexpages.currentPage().getParameters().get('templateName');
    }

    public PageReference ProcessContact(){
        try{
            Contact subContact = [select id from Contact where id=:conld limit 1];
            if(subContact != null){
                subContact.HasOptedOutOfEmail = false;
                subContact.EmailSubscribedOn__c = System.now();
                update subContact;
            }
            PageReference pageRef = new PageReference('https://company.com/bestaetigung/');
            return pageRef;
        }
        catch(DmlException e) {
            System.debug('An unexpected error has occurred: ' + e.getMessage());
        }
        return null;
    }
}
```

Email Alert :

Responsible for sending an email alert to the contacts once the updated information is received.

Email Alert [Printable View](#) | [Help for this Page](#) 


DSGVO_DoubleOptIn_Contact

[« Back to List: Email Alerts](#)

[Rules Using This Email Alert \(1\)](#) | [Approval Processes Using This Email Alert \(0\)](#)

Email Alert Detail [Edit](#) [Delete](#) [Clone](#)

Description	DSGVO_DoubleOptIn_Contact	Email Template	Double_Opt_In
Unique Name	DSGVO_DoubleOptInContact	Object	Contact
From Email Address	"OPTANIUM" <mailing@optanium.com>		
Recipients	Email Field: Email		
Additional Emails			

Rules Using This Email Alert [Rules Using This Email Alert Help](#) 

Action	Rule Name	Description	Object	Active
Edit Del Deactivate	DoubleOptIn_Contact		Contact	✓

Email Template:

Design your own email template containing the site URL that redirects to the web pages for accessing the visualforce page without logging in.