webrixs
PASSION FOR CRM

Creatio

GDPR compliance toolkit ACL (Accounts, Contacts, Leads)

Right to be forgotten and Right to access

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About this application:

Right to be Forgotten

Also known as Data Erasure, the right to be forgotten entitles the data subject to have the data controller erase his/her personal data, cease further dissemination of the data, and potentially have third parties halt processing of the data. The conditions for erasure, as outlined in article 17, include the data no longer being relevant to original purposes for processing, or a data subjects withdrawing consent. It should also be noted that this right requires controllers to compare the subjects' rights to "the public interest in the availability of the data" when considering such requests.

In short this means that this add-on will provide you with a solution to easily anonymize any personal data by opening a contact, account or lead and selecting the 'anonymize GPDR data' option from the action menu.

Right to Access

Part of the expanded rights of data subjects outlined by the GDPR is the right for data subjects to obtain from the data controller confirmation as to whether or not personal data concerning them is being processed, where and for what purpose. Further, the controller shall provide a copy of the personal data, free of charge, in an electronic format. This change is a dramatic shift to data transparency and empowerment of data subjects.

This addon will provide you with a basic insight report in the form of a MS Word printable on contact level to print out all personal information.
Note that you'll have to adjust this template to your environment and add any custom fields which contain information which fall under the Right to Access regulations.

Product compatibility

This application is developed for environments which have access to Leads, Contacts and Account.
If you do **not** have access to **Leads**, then please use the application: GDPR compliance toolkit AC (Accounts, Contacts)

Compatible with
All Creatio Sales and Marketing versions 7.11 and up
MS SQL environments

Not compatible with
Creatio Studio and Service
PostgreSQL environments
Oracle environments

Support conditions
To keep this app free of charge support is provided by email.
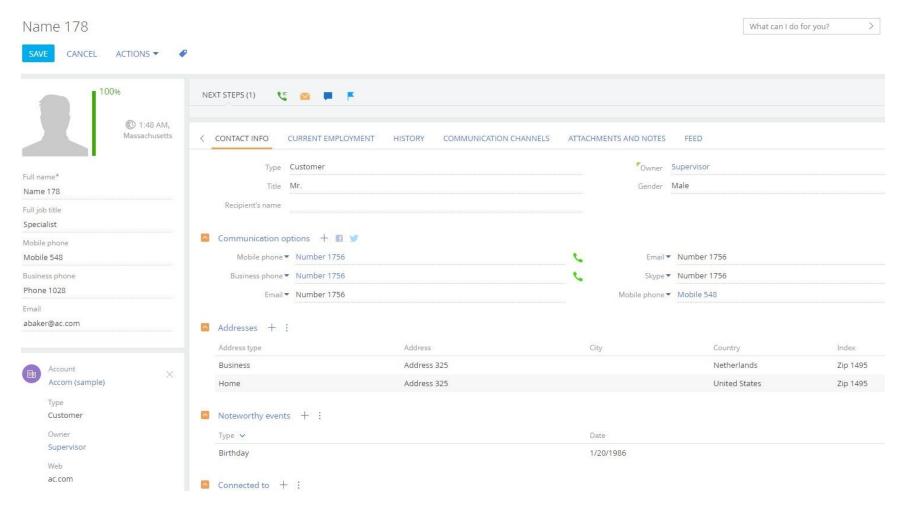Please send your questions and suggestions to support@webrixs.com

Corrections and improvements to be provided in the latest package update.

Right to be Forgotten instructions

To anonymize information just open any contact, account or lead record and choose 'Anonymize GPDR data' from the action menu. Note: This action cannot be undone. Once anonymized, the information cannot be recovered.
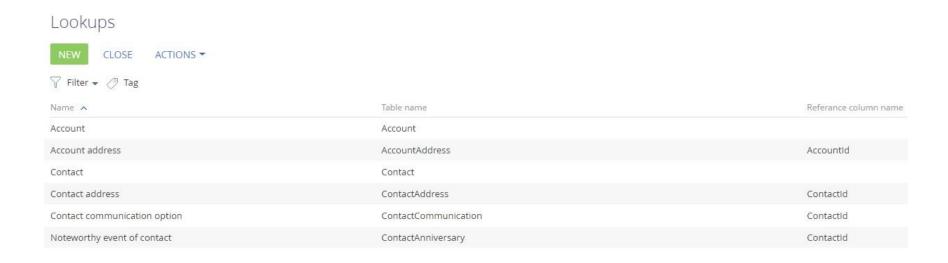
Once anonymized the personal information will be renamed to a random number.

Name 178

What can I do for you?

SAVE   CANCEL   ACTIONS ▼

100%

🕐 1:48 AM,
Massachusetts

NEXT STEPS (1)

Full name*
Name 178

Full job title
Specialist

Mobile phone
Mobile 548

Business phone
Phone 1028

Email
abaker@ac.com

| CONTACT INFO | CURRENT EMPLOYMENT | HISTORY | COMMUNICATION CHANNELS | ATTACHMENTS AND NOTES | FEED |

Type   Customer   Owner   Supervisor
Title   Mr.   Gender   Male
Recipient's name

Communication options ＋ f y

Mobile phone ▼   Number 1756   📞   Email ▼   Number 1756
Business phone ▼ Number 1756   📞   Skype ▼   Number 1756
Email ▼   Number 1756   Mobile phone ▼ Mobile 548

Addresses ＋ ⋮

Address type	Address	City	Country	Index
Business	Address 325		Netherlands	Zip 1495
Home	Address 325		United States	Zip 1495

Noteworthy events ＋ ⋮

Type ˅	Date
Birthday	1/20/1986

Connected to ＋ ⋮

Account   ✕
Accom (sample)

Type
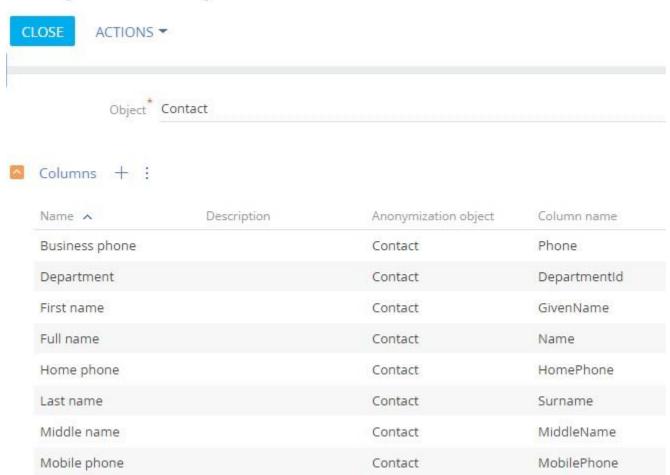Customer

Owner
Supervisor

Web
ac.com

Lookup settings

Lookup name: **Anonymization settings**

In the lookup you can add extra objects which need to be anonymized.
Note that specific fields, for example address and birthdate fields, can be found in different objects as seen in the example below.

Lookups

NEW   CLOSE   ACTIONS ▾

▽ Filter ▾   🏷 Tag

Name ⌃	Table name	Referance column name
Account	Account	
Account address	AccountAddress	AccountId
Contact	Contact	
Contact address	ContactAddress	ContactId
Contact communication option	ContactCommunication	ContactId
Noteworthy event of contact	ContactAnniversary	ContactId

Open an object to add the field which need to be anonymized.
Note that you should not add any unique identifiers (ID) fields.

Anonymization object / Contact

CLOSE   ACTIONS ▼

Object * Contact

∧ Columns + ⋮

Name ∧	Description	Anonymization object	Column name
Business phone		Contact	Phone
Department		Contact	DepartmentId
First name		Contact	GivenName
Full name		Contact	Name
Home phone		Contact	HomePhone
Last name		Contact	Surname
Middle name		Contact	MiddleName
Mobile phone		Contact	MobilePhone

Right to Access

To create the printable open any contact and open the GDPR Insight Report

GPDR right of access

Insight report

{INSERT YOUR COMPANY LOGO}

Contact summary

Name		Andrew Baker	
Birth date	9/13/1972	Recipients name	A.L. Baker
Preferred language		Gender	Male
Job title	Head of department	Department	Development
Full job title	Specialist	Role	Decision maker
Do not use phone	False	Do not use email	True
Do not use fax	False	Do not use SMS	True
Do not use direct mail	False		

Communication options

Addresses

Shipping
281 Summer St Massachusetts United States
Business
6th floor, 280 Summer street Massachusetts United States

Email addresses

ab@accom.com
Andrew.L.Baker@gmail.com

Phone numbers

Mobile phone	+1 617 440 1587
Home phone	+1 617 440 1981
Business phone	+1 617 440 2498

Social media

Skype	A.L.BakerONskype.com

Bulk email subscriptions

Newsletter	Subscribed
Focus email	Subscribed
Information material	Unsubscribed
Invitation	Unsubscribed

FAQ

Q: When anonymizing a record nothing happens
A: Please make sure that you do not configure any Unique Identifier (ID) fields to be anonymized. ID fields are used to identify and use a specific record. Without an ID no function will work.

Q: Some of my fields aren't being anonymized
A: make sure you add the correct object to the lookup, for example the address fields on contact are stored in Contact Address and not on Contact.

Q: How can I edit the printable
A: Please make sure you have the correct software installed and have a compatible Office version
https://academy.creatio.com/documents/lending/7-11/ms-word-printables-setup

Q: The printable isn't working, nothing happens
A: The default field in your environment might have been changed. To check where the issue is try the following:
1. Open de lookup - Printables
2. Select GDPR Insights Report and click Edit
3. Check if your environment has all the fields which are shown on the tab Fields of printables. If the field does not exist in your environment it should be removed.
4. Select the tab Tables of printables. Select every row and click edit. When you get an error message this object is not available in your environment and should be removed from the list.