

CONVERTR PRODUCT GUIDE

# Features to Support GDPR & Compliance



## How can Convertr Help with Compliance?

Since the announcement of GDPR, Convertr has been working to ensure we have the best tools available to support our clients in their own efforts to become GDPR compliant.

As a reminder, the list below shows all the features that will help you in your journey to becoming GDPR compliant, alongside key issues they support.

# An Overview of Convertr Compliance Features

To know more about a feature, simply click 'jump to feature' to see a short introduction on why we recommend you use this feature and a step-by-step walk-through on how to use it.

## Subject Access Request Tool

A straightforward tool to search, export and delete the data of a specific individual in the event of a [Subject Access Request](#)



[RIGHT TO ACCESS](#)

---

[RIGHT TO BE FORGOTTEN](#)

---

[DATA PORTABILITY](#)

---

[→ JUMP TO FEATURE](#)

## Email & Telephone Suppression

If you receive an objection, you can ensure that they are swiftly deleted or suppressed from Convertr processing activities using this feature



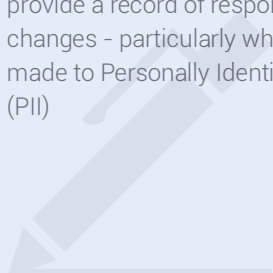
[RIGHT TO ERASURE](#)

---

[→ JUMP TO FEATURE](#)

## System & Campaign Auditing

Convertr maintains a robust Audit Log throughout the platform. This is how Convertr ensures each action is tracked and can provide a record of responsibility for any changes - particularly when modifications are made to Personally Identifiable Information (PII)



[ACCOUNTABILITY AND GOVERNANCE](#)

---

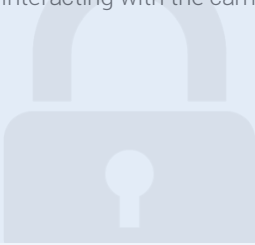
[BEST PRACTICE](#)

---

[→ JUMP TO FEATURE](#)

## Data Masking

A useful privacy tool for helping you ensure your lead data is secured - even whilst interacting with the campaign around them



BEST PRACTICE

---

DATA PROTECTION BY DESIGN & DEFAULT

---

[→ JUMP TO FEATURE](#)

## Form Opt-In

Using our form builder, you can quickly and easily design powerful forms with a default opt-in box, ready to customise



DATA PROTECTION BY DESIGN & DEFAULT

---

CONSENT

---

[→ JUMP TO FEATURE](#)

## Double Opt-In

A very useful function to take the extra step of gaining double opt-in for your data records



CONSENT

---

[→ JUMP TO FEATURE](#)

## Data Deletion & Retention Period

You should always remove data you no longer need. Convertr has two very useful tools to help you delete PII data: you can automatically delete after a set time frame, or right after integration



BEST PRACTICE

---

[→ JUMP TO FEATURE](#)

COMPLIANCE FEATURE

# Subject Access Request Tool



# Subject Access Request Tool

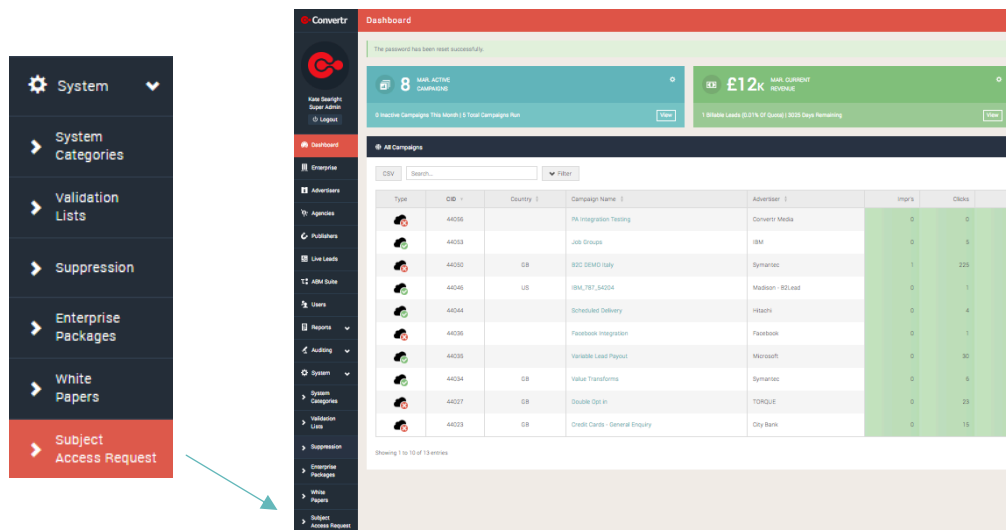
The subject access request tool allows you to search the entirety of your Converttr database for a single user by either telephone number or email address.

How it Works	How it Helps
<p>If you search for a user using their email or telephone number, the platform will instantly return all associated data (including enrichment data) about the individual.</p> <p>This data can be downloaded to pass back to the person who requested the information.</p> <p>We also have the functionality for the data to be permanently removed (without affecting operational reporting).</p>	<ul style="list-style-type: none"><li>• <b>Right to access:</b> Under GDPR users have the "Right to access" data you have stored about them in a fast, free and efficient manner which should be available in an electronic format.</li><li>• <b>Right to erasure:</b> Also known as the "right to be forgotten", a person can request you delete their data, and even ask you to stop third parties processing the data (see suppression below)</li><li>• <b>Data portability:</b> GDPR also introduces data portability. Allowing them to request the data and move it to another data controller in a common data format (e.g. csv)</li></ul>

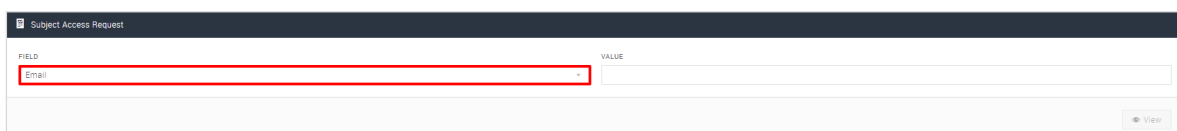
## Fulfilling a Subject Access Request

1. Find the Subject Access Request tool.

On the campaign dashboard, go to 'System' and then select 'Subject Access Request'.



2. On this page, you can choose the drop-down menu to select 'Email' or 'Telephone'.



3. Enter the appropriate value for your choice in the 'Value' field.

The screenshot shows a form titled "Subject Access Request". It has two main input fields: "FIELD" and "VALUE". The "FIELD" dropdown is set to "Email". The "VALUE" text box contains the email address "test@convertmedia.net", which is highlighted with a red rectangular border. A "View" button is located at the bottom right of the form.

4. Click 'View'. Below will be all the lead details for the lead containing the value specified.

This screenshot shows the "Subject Access Request" interface after a search. The "FIELD" is "Email" and the "VALUE" is "michael.kononanyi@convertmedia.net". A red box highlights the "View" button. Below the search bar is a "Results" section with "Download" and "Delete All" buttons. A table displays lead details:

Name	Value	Type	Source
Lead ID	123456789		
Created	2023-10-27 10:30:00		
Advertiser	Test Advertiser		
Campaign	Test Campaign		
Publisher	Test		
First Name	Michael		
Last Name	Kononanyi		
Email	michael.kononanyi@convertmedia.net		

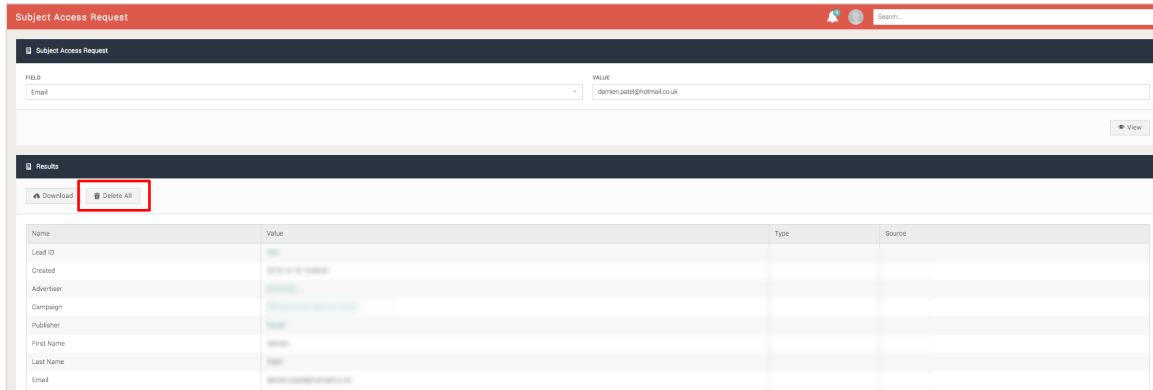
5. At the top of the results section, you have the option to download the information. This will provide you with a copy of all the subject's information in a .csv file.

This screenshot shows the "Subject Access Request" interface with a different search value. The "FIELD" is "Email" and the "VALUE" is "damien.gate@hotmail.co.uk". A red box highlights the "Download" button in the "Results" section. The table below shows lead details for this email address:

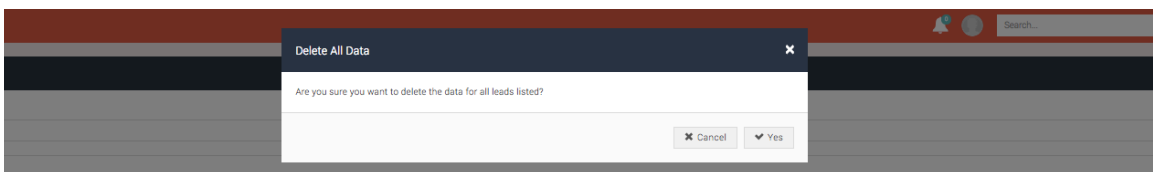
Name	Value	Type	Source
Lead ID	123456789		
Created	2023-10-27 10:30:00		
Advertiser	Test Advertiser		
Campaign	Test Campaign		
Publisher	Test		
First Name	Damien		
Last Name	Gate		
Email	damien.gate@hotmail.co.uk		

## Erasing a subject's information from the Convertr database

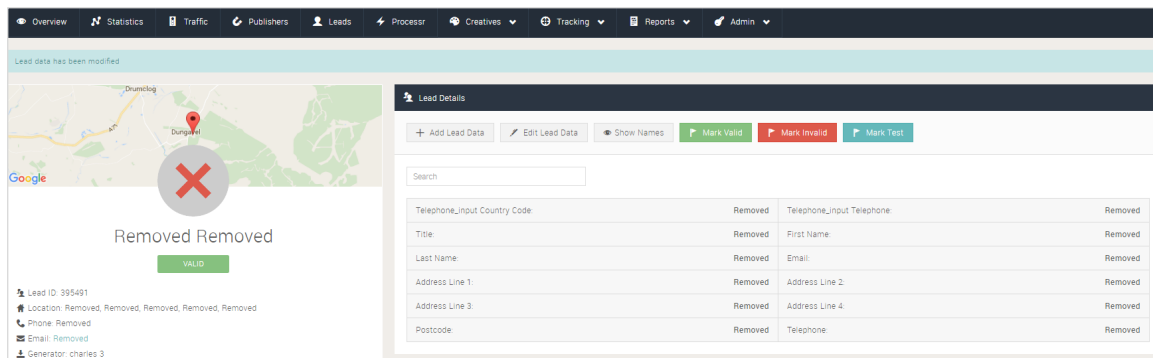
As well as being able to download a copy of all the information, you also have the option to delete it completely from the platform.



1. If you click 'Delete', Convertr will ask you to confirm your choice. Clicking 'Yes' will delete the data for all the leads listed.



Once you have deleted a lead's details, they will still appear on the platform but all details will have the value 'Removed'.



When you see this page, this means that all the data for that specific lead would have been removed from our database.



COMPLIANCE FEATURE

# Email & Telephone Suppression



# Email & Telephone Suppression

If you receive an objection under the 'right to erasure', you should use this feature to ensure the individual is swiftly deleted or suppressed from Convertr processing activities.

Note that to support best practice, email and telephone suppression should be enabled on all campaigns.

This will help to ensure all your campaigns respect the rights of anyone who has objected in the past.

How it Works	How it Helps
<p>With Convertr, you can add email and telephone numbers you do not wish to contact into a suppression list.</p> <p>To apply this list to your campaigns, you'll need to set-up a job for the list to be enabled on your campaigns.</p> <p>Doing this will ensure that suppressed emails are not deemed valid and hard fail - preventing them from being integrated to the client.</p> <p>Other suppression methods can be applied using our incredibly versatile Validation list functionality.</p>	<ul style="list-style-type: none"><li>• <b>Right to erasure:</b> The "Right to erasure" can prevent you from contacting an individual in future. They can also restrict the processing of their data.</li></ul> <p>By using an email or telephone suppression list you can ensure we'll never pass on data about this lead again</p>

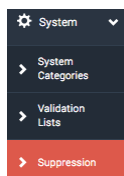
## Creating Suppression Lists

A suppression list can be set up in various areas:

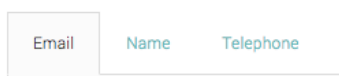
- At a systems level
  - This can apply the list to all campaigns on the platform
- At a campaign level
  - This will apply the list to that campaign only

## Setting up Suppression Lists at a Systems Level

1. Once logged into the platform select 'System' then 'Suppression'



2. In here you will find 3 different types of suppression lists which you can add to the platform: 'Email', 'Name' and 'Telephone'.



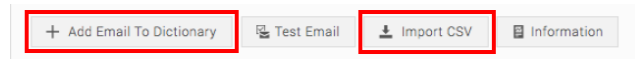
3. You can add values to these suppression lists in two ways:

#### A. Add Email to Dictionary

You can use this to add an individual email to the list

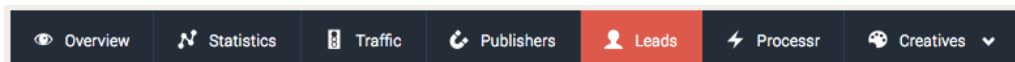
#### B. Import CSV

You can use this option to upload a large list, simply drag and drop a CSV file into the drop zone.

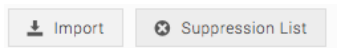


## Setting up Suppression Lists at a Campaign Level

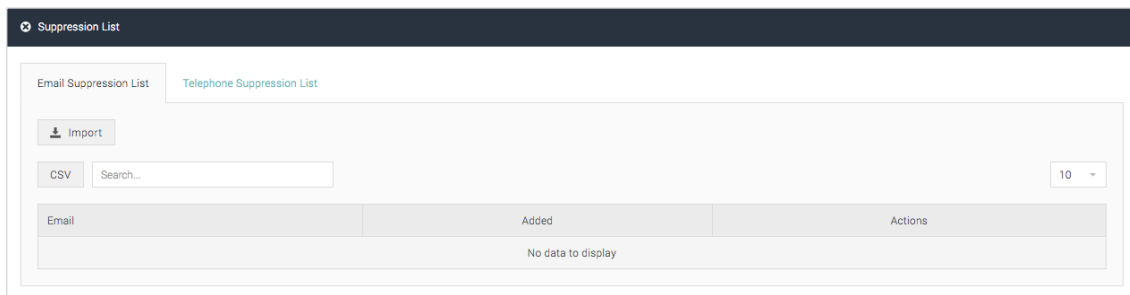
1. Once logged onto the platform, select your campaign, then select the 'Leads' tab.



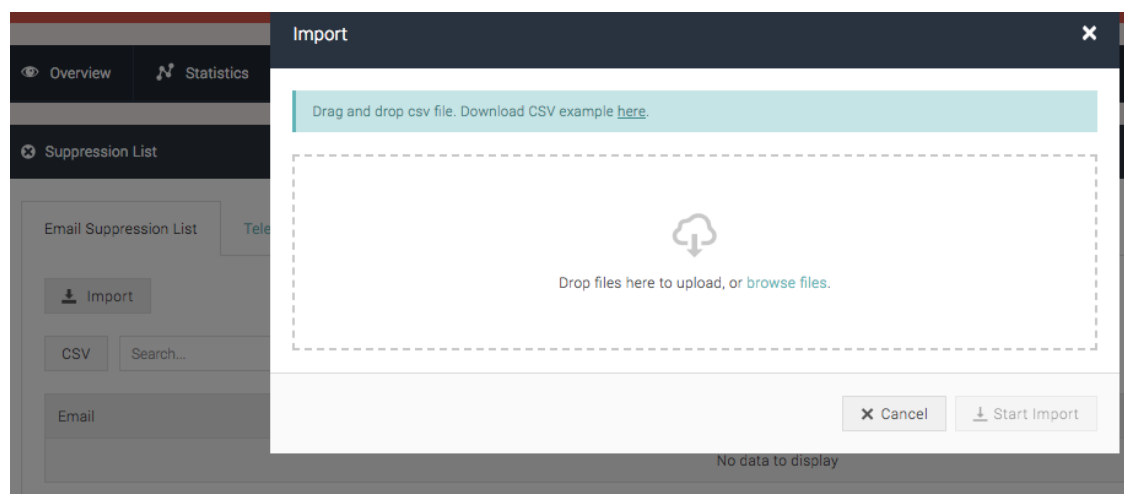
2. Select 'Suppression Lists'



3. Here you will see two tabs 'Email Suppression List' and 'Telephone Suppression List'



4. To import a list to either of these sections, select the tab that you wish to import to, click 'Import' and drag and drop your file into the drop zone



COMPLIANCE FEATURE

# System & Campaign Auditing



# System & Campaign Auditing

Convertr's comprehensive audit of interactions ensures every change is tracked and accounted for. This helps support best practices and uphold user accountability on the platform. It's also particularly useful when modifications are made to Personally Identifiable Information (PII).

All Admins and Super Admin users can access the audit. It clearly shows:

- What action was taken
- Where the action took place
- The exact time and date it happened
- Which user account carried out the action

How it Works	How it Helps
<p>All events and actions within the platform are added to an audit.</p> <p>This includes importing of leads from a publisher to exporting data via the report builder. All actions are logged with a time stamp and the key information.</p>	<ul style="list-style-type: none"> <li>• <b>Accountability and governance:</b> GDPR promotes measures that help maintain accountability, governance and working with transparency.</li> </ul> <p>Convertr supports this by providing Admins and Super Admin users with access to the Audit Log; effectively creating a clear 'paper trail' to track and trace all changes to the platform and the data within it, as well as demonstrating each user's responsibility for those changes.</p>

## A Guide to the System Audit Log

All Admins and Super Admins have access to the Audit Log in the sidebar. You can find it under 'Auditing' > 'System Audit'.

The screenshot shows the 'Auditing' sidebar with 'System Audit' selected. The main content area displays a table of audit entries. At the top right of the sidebar, there are notification icons and a search bar. Below the sidebar, the 'System Audit' page has a 'CSV' button and a search field. The table below shows the following data:

Date And Time	Severity	Page	Action	User	Notes
29/03/2018 01:59:43	Medium	User	Edit	alice.chapman	User 406 - Publisher has been updated
29/03/2018 01:59:43	Medium	Validation Lists	Update	Priya.Patel	Value Name Edited - hotmail.com to hotmail.co.uk in email - Convertr Media
29/03/2018 01:59:43	Medium	Validation Lists	Import	Priya.Patel	Validation Value(s) Imported - suppression-values-example (30) csv in email - Convertr Media
29/03/2018 01:59:43	Medium	Validation Lists	Created	Priya.Patel	Validation List Added - email - Convertr Media
29/03/2018 01:59:43	Medium	User	Create	cvtr.danny	User 461 - api_admin has been added
29/03/2018 01:59:43	High	User	Delete	cvtr.danny	User 454 - duncan.stables_deleted1522061526 has been removed
29/03/2018 01:59:43	High	User	Delete	cvtr.danny	User 416 - james.lewendon_deleted1521829525 has been removed
29/03/2018 01:59:43	Medium	User	Edit	cvtr.danny	User 416 - james.lewendon has been updated
29/03/2018 01:59:43	High	Campaign	Delete	adam.carter	Campaign 44056 - PA Integration Testing has been removed
29/03/2018 01:59:43	Medium	User	Edit	Michael.Konomanyi	User 419 - Michael.Konomanyi has been updated

Showing 1 to 10 of 500 entries

Page navigation: 1 2 3 4 5 Next Last

COMPLIANCE FEATURE

# Data Masking

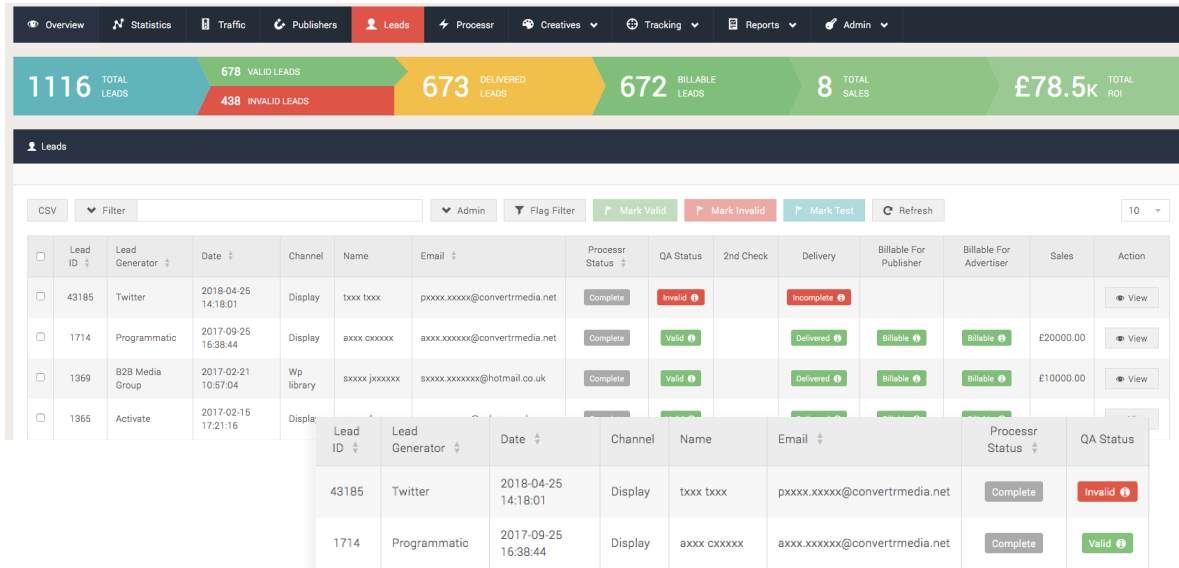


# Data Masking

By activating 'Data Masking' on the platform, you have the option to hide Personally Identifiable Information from agency users without affecting typical campaign management.

The only difference is that when Agency Users view leads, they will only be able to see the lead generator and the Lead ID, but no other details are revealed.

This is what an Agency User will see when data masking is activated:



We recommend using this feature as you should always be making efforts to ensure your lead's privacy while using the platform.

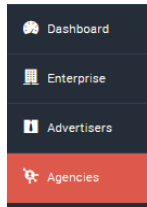
In fact, to help you with best practice, Convertr activates Data Masking by default every time you add an agency to the platform.

How it Works	How it Helps
<p>Every Agency setup has the option to mask lead data from the users in that Agency.</p> <p>This gives the campaign manager full access to the tools they need to manage campaigns but with a fully masked view of Personally Identifiable Information (PII).</p>	<ul style="list-style-type: none"> <li>• <b>Best Practice:</b> As data controllers and data processors are both equally liable for protecting the personal data, we have a useful tool for helping you ensure your lead data is secured even whilst interacting with the campaign around them.</li> <li>• <b>Data Protection by Design and Default:</b> To make set-up easy, we've activated data masking by default for every new agency. It's also been designed in a way that makes data protection a standardised practice in day-to-day campaign management: you can continue to use the platform as you would normally even with masked data.</li> </ul>

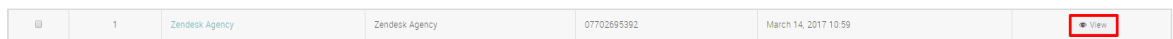
# Masking Lead Data from Agencies

Please note: Data Masking is enabled by default and will be automatically activated every time you set-up a new agency.

1. On the platform dashboard, go to 'Agencies'.

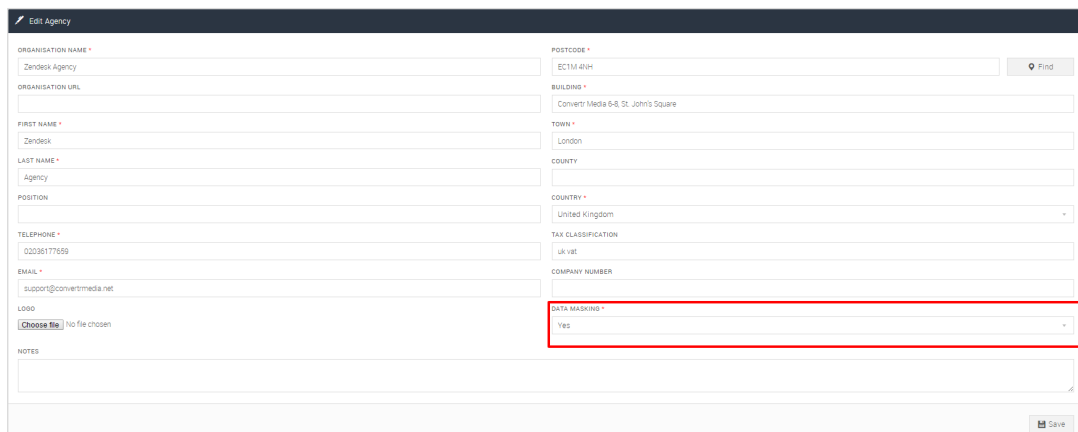


2. Click 'View' next to your chosen agency.

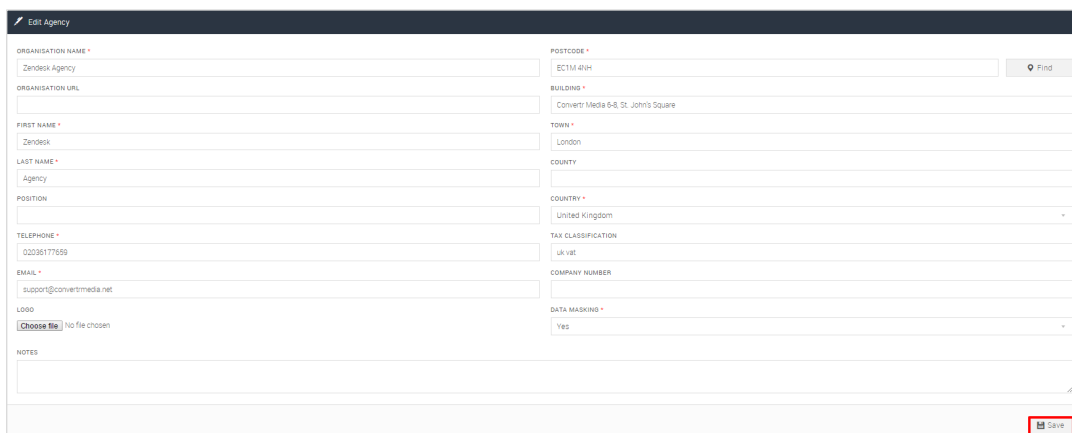


3. In the bottom right of the 'Edit Agency' page, there is a data masking option.

- If you set this to 'Yes', then all users assigned to this agency will not be able to view the full lead data.
- If set to 'No', then all users assigned to this agency will be able to view the full lead data.



Once you have confirmed your choice, make sure you click 'Save' at the bottom of the page.





COMPLIANCE FEATURE

# Form Opt-In



## Form Opt-In

As part of best practice, Convertr has made it easy for our users to gain a clear and specific statement of consent from their audience when using the Convertr Form Builder for data capture:

All Convertr forms include opt-in boxes by default, so anyone creating a form in Convertr will automatically have the technology they need to gain and record a positive opt-in every time.

How it Works	How it Helps
<p>Convertr's out-of-the-box form templates come with opt-in and contact options by default.</p> <p>All you need to do is change the default link in the privacy policy to your own.</p>	<ul style="list-style-type: none"><li>• <b>Consent:</b> Consent means offering your audience real choice and control. Under GDPR, consent requires a clear, positive opt-in (no pre-ticked boxes).</li><li>• <b>Data Protection by Design and Default:</b> Convertr champions the GDPR's 'data protection by design' policy, which means the platform is built to incorporate key data protection features where possible, such as the opt-in box.</li></ul>

## Creating/Editing A Form to Add Opt-In

Please note: the default text links to Convertr Privacy Policy – anyone using the Form Builder to gain consent will need to change this link to their own privacy policy.

### Prerequisites

You will need to create a campaign with a form which will contain the opt-in field (see Creating/Editing A Form for more on form building).

## Adding and Editing the Opt-In Form Type

Add a field to your form and change the 'type' to 'Opt-in'.

The screenshot shows the Convertr Form Builder interface with two form blocks. The top block is an 'Optin' field. A dropdown menu is open on the left, showing various field types: Optin, HtmlInput, HiddenInput, Optin (highlighted), UsStateList, PostcodeDealerLookup, and Telephone. The configuration for the 'Optin' field is as follows:

TYPE	FIELD NAME	INPUT LABEL	PLACEHOLDER	CLASS
Optin	optin	Opt In	Opt In	
	<input checked="" type="checkbox"/> Enabled	<a href="#">Edit Options</a>	<a href="#">Edit Choices</a>	

The bottom block is a 'Submit' field with the following configuration:

FIELD NAME	INPUT LABEL	PLACEHOLDER	CLASS
submit	Submit	Submit	
	<a href="#">Edit Options</a>		

## Customising the Opt-In Checkbox Text

Click the 'Edit Options' button on the form block to bring up a modal which will allow you to edit the main opt-in checkbox.

terms	I accept that the data provided on this form will be processed, stor	+	x
-------	--	---	---

The text can be changed by editing the content on the right of the 'terms' box. You can add/edit your own privacy link by wrapping your desired copy in an HTML link tag, as shown below.

```
I accept that the data provided on this form will be processed, stored, and used
in accordance with the terms set out in our <a
href="yourprivacypolicylinkurlhere" target="_blank">privacy policy</a>.
```

## Customising the Contact Method Label/Title

Click the 'Edit Options' button on the form block to bring up a modal which will allow you to edit the contact method label/title.

contact_choice	Preferred contact method:	+	x
----------------	---------------------------	---	---

Edit the text to the right of the 'contact\_choice' input to change the label/title or click the cross to remove this label/title.

## Customising Contact Method Checkboxes

Once your 'opt-in' type has been added to your form, you will be able to see 4 contact methods added by default (email, tel, sms, post).

**Opt In**

I accept that the data provided on this form will be processed, stored, and used in accordance with the terms set out in our [privacy policy](#).

Preferred contact method:

email                       tel

sms                               post

To customise these options, click the 'Edit Choices' button on the opt-in form block. This will bring up the 'Choice Editor' modal which will allow you to add new options, edit the value and labels of options, re-order options and remove options.

### Choice Editor

email	Email	+	x
tel	Telephone	+	x
sms	SMS	+	x
post	Post	+	x

COMPLIANCE FEATURE

# Double Opt-In



# Double Opt-In

Convertr provides the additional functionality to gain double opt-in on the campaign.

With GDPR, business may prefer to follow the best practice method of reinforcing their 'opt-in' method with a 'double opt-in' – with the right set up, both are possible with Convertr.

As opt-in is a legal requirement when collecting data, it is the default setting

How it Works	How it Helps
<p>Every Convertr form provides the functionality to ensure every lead generated via that form has 'opted-in', although some users may wish to add an additional layer of protection and confirm the data being collected really belongs to the individual submitting the data</p> <p>For users wishing to do this, Convertr can immediately send a welcome email to the user to confirm their opt-in (commonly known as double opt-in).</p> <p>For additional safety, Convertr won't start processing the data until the user has confirmed their opt-in via the email link.</p>	<ul style="list-style-type: none"><li>• <b>Consent:</b> In addition to opt-in, many businesses are following the best practice of using a 'double-opt-in' and following-up with an email.</li></ul> <p>This allows for a more explicit opt-in by the user. The extra confirmation step also verifies the users email address.</p>

## Enabling Double Opt-In for Your Campaign

A double opt-in campaign allows the campaign to verify if a lead has opted in to your initial data capture form and to a follow-up email.

This is achieved by triggering a conversion pixel upon the completion of the aforementioned data capture form and click through to a secondary landing page.

- **Email creative:** The process starts with a normal email asset which arrives in your leads inbox, normally sent via publishers/marketing automation.
- **Landing Page:** Upon click through of this asset, your lead arrives at a landing page where they will complete the form (which includes the first opt-in checkbox as described in the 'single opt-in' instructions above).
- **Data capture:** Once the data capture form on the landing page is completed by the lead, a secondary 'double opt-in' email is automatically sent to the lead (based on the email address provided during data capture).
- **Opt-in email:** This email will link through to a 'double opt-in' landing page which fires a conversion pixel. Following this, the lead is removed from a holding state and can start being processed.

## Prerequisites

You will need to create a campaign. The campaign needs your main email asset and your main landing page already set up before the 'double opt-in' email asset and landing page can be set up.

The form will also require an 'Email' data capture field to trigger the automatic send of the 'opt-in' email

For double opt-in to work successfully, all leads need be generated via a publisher tracking link which allows the platform to track the entire process outlined above.

## Setting Up Your Campaign for Double Opt-In

Within your campaign, go to 'Admin' > 'Setup' and find the 'Double Opt-in' setting. Set this value to 'Yes' to enable it for your campaign.

<b>DOUBLE OPTIN *</b>	Yes
-----------------------	-----

## Adding the Opt-In Email

Your 'opt-in' email should contain a link directing your lead to your 'opt-in' landing page. Therefore, a link placeholder must be added to your 'opt-in' email creative.

This placeholder will allow a secondary tracking link to be set up within the campaign, creating the link between the 'opt-in email' and 'opt-in landing page' (more on this in the 'Setting Up Opt-in Tracking Links' section below).

The below shows an example of the 'opt-in' link within the 'opt-in email' HTML with a placeholder of ##link2##.

```
<a href="##link2##">  
Opt-in Link  
</a>
```

If your 'opt-in' email has the above placeholder included within the HTML, upload the email creative to the campaign assets.

Once uploaded, click the 'edit' button in the campaign 'creatives' > 'assets' page on your 'opt-in' email and change the 'type' to 'Double Opt-in Email'.

**TYPE \***

Double Optin Email ▼

Then select the form that your 'double opt-in' email will be linked to. This means that once the selected form is completed by a lead, this 'opt-in email' will be automatically sent to the inbox of the email address entered in the data capture form.

**SELECT FORM**

Demo - Double Optin ▼

## Add the Opt-In Landing Page

Your landing page must contain a conversion pixel, which will fire once your lead is directed to this page after clicking on the 'opt-in email' link. This pixel allows the platform to recognise that the lead has completed the double opt-in process.

Create your 'opt-in' hosted landing page, however this time include the iframe conversion tag anywhere in the body of your landing page HTML. Since this landing page doesn't require any data capture, the ##iframe## placeholder doesn't need to be included.

The conversion tag can be found under the 'Tracking' > 'Embed Tags' section of the campaign, under the 'Secure iFrame Conversion Tag' area.

Lead Tags

To be placed on the Advertisers 'Thank You' page or 'Successful Checkout' page. The Advertiser will need to put this on their page unless you are hosting the landing page.

Tags	Scripts
Secure iFrame Conversion Tag	<pre>&lt;iframe src="https://demotrk.cvtr.io/conversion/iframe?CID=44027&amp;OID=" height="0" width="0" border="0" style="display:none"&gt;&lt;/iframe&gt;</pre>

Upload your 'opt-in' landing page to the campaign.

Note: You may come across a prompt along the lines of 'This asset does not contain an ##iframe## tag,' whilst uploading your landing page, however this can be ignored as this 'opt-in' landing page does not require a form.

## Setting Up Opt-In Tracking Links

Within your campaign tracking links (see Creating Assets and Tracking Links for more on this), you should now have 2 tracking links. One for your initial data capture landing page, and another for your 'double opt-in' landing page. The placeholder of your 'double opt-in' landing page must match the placeholder used in the HTML of the 'opt-in' email creative. E.g.

double-optin-pixel	##link2##	Email	2017-03-07	<a href="https://demo.cvtr.io/lp/double-optin-pixel">https://demo.cvtr.io/lp/double-optin-pixel</a>
double-optin	##link1##	Email	2017-03-07	<a href="https://demo.cvtr.io/lp/double-optin">https://demo.cvtr.io/lp/double-optin</a>

Once all the above steps have been completed, your campaign is complete and ready for double opt-in.

COMPLIANCE FEATURE

# Data Deletion & Retention





# Data Deletion & Retention

It's best practice to ensure you do not retain personal data any longer than is necessary for the purpose you obtained it for.

Convertr has two tools to help maintain this important practice systematically - both options will keep the record in the database but remove the lead data, meaning financial reporting will remain unaffected.

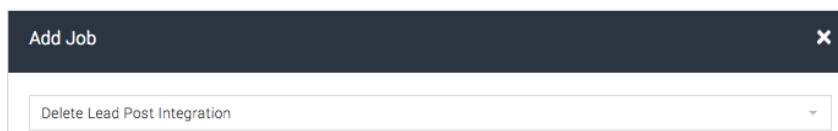
Please note: Data retention periods must be stated in all relevant privacy policies.

How it Works	How it Helps
<ol style="list-style-type: none"><li><b>Erasing data after delivery:</b> We have the functionality to remove all the received data from a lead immediately after it's been processed. This is configured on a campaign level by adding it as an integration job.</li><li><b>Erasing data automatically after a set timeframe:</b> Configurable in the Enterprise &gt; Configuration section, you can define how long to retain data for. All older data will be removed once it falls outside this period.</li></ol>	<ul style="list-style-type: none"><li><b>Best Practice:</b> Data should not be kept for longer than is necessary for the purpose it was collected for.</li></ul> <p>In addition, privacy policies should also state retention periods, and using automated deletion processes will help your business adhere to that specified time frame.</p>

## Automatically Erasing Data After Delivery

When a lead enters the platform, you can remove personal data from the lead immediately after it has been processed. To do this, you need to assign a 'Delete Lead Post Integration' job to the campaign:

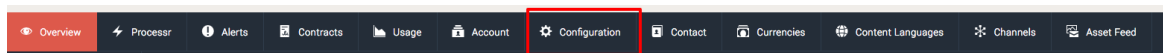
- Go to the Processr > Integration Tab and locate the 'Delete Lead Post Integration' tool.



- Configure the job accordingly

## Erasing Data After a Specific Timeframe

It's easy to erase data after a specific timeframe within the platform. To do this, select the 'Enterprise' tab on the left menu bar, then 'Configuration'.



Scroll down to the Privacy Settings and enter your data retention period

Privacy Settings	Privacy Values	Help
Data retention period	<input type="text"/>	Time for how long to store lead data (in months)

Convertr is committed to helping all lead generation teams work more openly and effectively with their clients, suppliers and partners across the world.

If you have any questions about the tools and features listed here, you can find more information, help and FAQs at [Convertr's Help Centre](#).

For any other queries, please email [GDPR@convertrmedia.com](mailto:GDPR@convertrmedia.com)