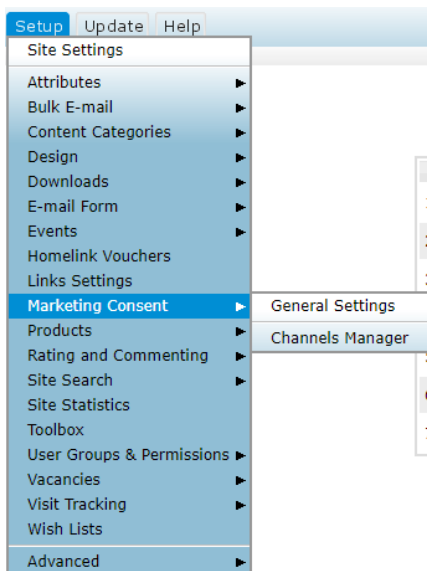# How To Setup Marketing Consent Module

ENSURE THE MARKETING CONSENT MODULE IS INSTALLED

The Marketing Consent module can be found within the CMS under Setup > Marketing Consent, if this does not exist, please contact support@intergage.co.uk to have this module installed on your CMS Installation.

This module will allow you to apply options to Intergage E-mail Form Items that impower your visitor to fill in the form and select what they'd like to "Opt-Out" or "Opt-In" to in terms of Marketing Consent.

DEFINITIONS

Visitor – a logged in or out visitor on the website

User – a logged in known user

Consent – a freely given affirmative action from a Visitor to do something

Channel – one of a number of consents given by a Visitor, such as consent to receive "Emails", "Calls" but also to be "Tracked", "Analysed" where a Visitor can Opt In / Out of different Channels

GENERAL SETUP

Once you have navigated to Setup > Marketing Consent > General Settings please read the introductory text to ensure the module will comply with your interpretation of laws such as the GDPR.

In most cases the "default" settings within this module reflect our interpretation of the GDPR law, however, it is your responsibility to seek legal advice on the exact setup and wording for each option, and to let Intergage know where the system does not meet requirements.

You must review each field on this form, each field explained:

"Select where the consent form is shown" – throughout the site there may be various forms that collect personally identifiable information, tick the forms that you wish to add Marketing Consent fields to.

Email Form Items are used for a wide range of purposes; therefore, it may not be appropriate to apply Marketing Consent fields to them all. The fields can be added to all Email Form Items, or just to a specific Email Form Item. The option is in the Email Form Item itself to add consent fields.

Select where the consent form is shown

Display Consent Form in the Checkout: ☑

Display Consent Form during Donations: ☑

Display Consent Form during Bulk Email Subscription: ☑

Display Consent Form on Email Form Items: All ▼

"Privacy Policy Version" – consent is logged against the privacy policy version in effect at the time the consent was given. Whatever value is entered here, will be stored alongside consent in the consent logs. This should be updated each time the Privacy Policy changes.

Privacy Policy

Privacy Policy Version: 1

"Default States" – Set the default that any visitor who has not given us explicit consent will receive. This can be divided into existing users and new users.

Implied Consent will display the consent the site will assume, and only give the visitor the option to leave the site, otherwise if the visitor remains on the site, consent is assumed. Whether this consent is Opt In or Opt Out is defined here.

Note: The "Necessary Cookies" behaves as an "Implied Consent", however this is a visual feature only, and has no reflection on whether the Implied State is Opt In or Opt Out. Necessary Cookies can always be thought of as "on" regardless of other settings.

Default states

Existing State Consent: Opt-Out ▼

New User State Consent: Opt-Out ▼

Implied State Consent: Opt-Out ▼

"Logged in Users" – As the inline text suggests, it refers to a situation where the email entered into a form does not match the email address of the logged in user. This controls whether the user, or email address entered are the subject of the consent given.

Logged In Users

Where a User fills in a form with another email address whilst logged in.
E.g. fred@frederick.com is logged in and fills in a contact form as bill@william.com

Apply Consent to the User only: ☑

"Existing Logged Out Users" – this covers the case where an existing user who is not logged in fills in a contact form and provides their known email address.

On websites that offer a login area, the Consent Editor Page Item can be used to allow the User to amend their own consent.

On websites without a login area, rather than creating a login area of the site solely for consent, an Email Form Item can be created for the purpose of updating consent. Therefore, the Email Form Item would be allowed to update the consent for an existing logged out User.

Existing Logged Out Users
Where a User is not logged in, but fills in an Email Form Item or Bulk Email Subscribe Form that contains a new set of preferences.

Behaviour : ⑦ Don't change preferences and output warning ▾

Warning Message Text: ⑦ You have changed the Marketing Consent Preferences for an existing User. You must log in to change the Marketing

"Consent Bindings" – this section allows consent to be related to functionality of the website.

This means that when the website functionality is bound to a consent channel, if the Visitor has not given consent, that functionality will be disabled.

E.g. when Analytical Cookie Channel is set to Analytical Cookies, and the Visitor has not Opted In to Analytical Cookies, Google Analytics will not be added to the page.

Consent Bindings

Analytical Cookie Channel: ⑦ Analytical Cookies ▾

Social Cookie Channel: ⑦ Social Cookies ▾

Visitor Interaction Tracking Cookie Channel: ⑦ Tracking Cookies ▾

Email Channel: ⑦ Emails ▾

No Email Message Text: ⑦ The system tried to send an email '$SUBJECT$' but this was not sent because of your Email Consent

"Bulk Emails" – this section applies to Bulk Emails sent from the CMS and is independent from Bulk Email Subscriptions. Therefore unsubscribing from a Bulk Email Topic and Opting Out of all Bulk Emails are two different things.

Signing up for a Bulk Email does not imply consent to receive emails. Therefore consent to receive emails must also be obtained.

Bulk Emails

Bulk Email Prevention Channel: ⑦ Emails ▾

Unsubscribe Page: ⑦ Home ▾

Unsubscribe Log Text: ⑦ You have opted out of being contacted by email.

"Appearance" – this controls how the consent is displayed.

Pre-ticking preferences can probably be enabled providing the site never displays existing users consent.

The Heading Text can be used to display an explanation of Marketing Consent to the end user above the consent fields.
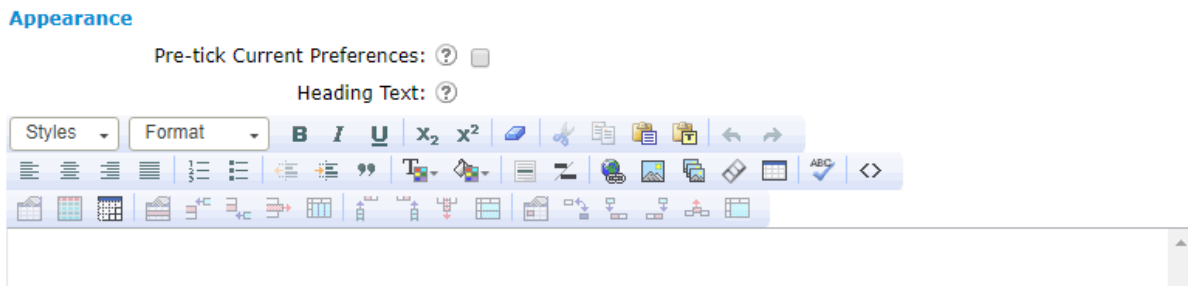
MARKETING CONSENT CHANNELS

By default, the following channels are provided:

- Telephone Calls – a channel for collecting consent to call Users
- Direct Mail – a channel for collecting consent to direct mail Users
- Emails – a channel for collecting consent to email Users
- Necessary Cookies – a channel to display the fact that the site uses "Necessary" cookies in the Cookie banner, this is deliberately set to be "Implied" so that it is on, and cannot be disabled
- Analytical Cookies – a channel to store the consent to have analytics on the page
- Tracking Cookies – a channel to store the consent to have tracking on the page
- Social Cookies – a channel to store the consent to have social bookmarks (such as Facebook Like, and Tweet buttons) on the page

Additional channels can be added with the add record button, and existing channels can be edited as required with the icon that resembles a white piece of paper with a pencil as seen below.

	Channel Name	Enabled	Consent Type	Label	Description	Consent Type	Checked By Default
1	Telephone Calls	Yes	Marketing Channel	Telephone Calls	Tick this box if you would lik...	Opt-In	No
2	Direct Mail	Yes	Marketing Channel	Direct Mail	Tick this box if you would lik...	Opt-In	No
3	Emails	Yes	Marketing Channel	Emails	Tick this box if you would lik...	Opt-In	No
4	Necessary Cookies	Yes	Cookie	Necessary Cookies	Necessary Cookies are required...	Implied	No
5	Analytical Cookies	Yes	Cookie	Analytical Cookies	Enabling Analytical Cookies pr...	Opt-In	No
6	Tracking Cookies	Yes	Cookie	Tracking Cookies	Tracking Cookies allow us to u...	Opt-In	No
7	Social Cookies	Yes	Cookie	Social Cookies	Enabling Social Cookies turns ...	Opt-In	No

Add Record

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The description text of each channel is shown to the Visitor, and the description text the Visitor was shown is also logged against the Consent given.

VIEWING CONSENT

Users consent is logged in the User Manager. See "Marketing Consent Logs" tab.

Consent log entries contain the date/time consent was given, the person who changed the consent (usually the User themselves), the channel, the Consent State (Opt In / Opt Out), the information they were provided with at the time, and the version of the Privacy Policy at the time the consent was given.

This information can be exported into a CSV file.

EDITING A USERS CONSENT

The Site Admin has the ability to edit a User's Consent at any time.

Within the User Manager tab "Marketing Consent", the existing current consent is shown.

The Admin can edit this consent, for example in response to a User calling in and saying "Please stop calling me, but you can email me". In this case the Admin would untick "Telephone Calls" and tick "Emails".

When the Admin updates consent, they are required to give a reason for the change.

When an Admin changes consent, this is logged in the Users Consent Log as consent changed by the Admin, along with the date/time this was done. The reason for the change is also logged and may be needed for auditing purposes.