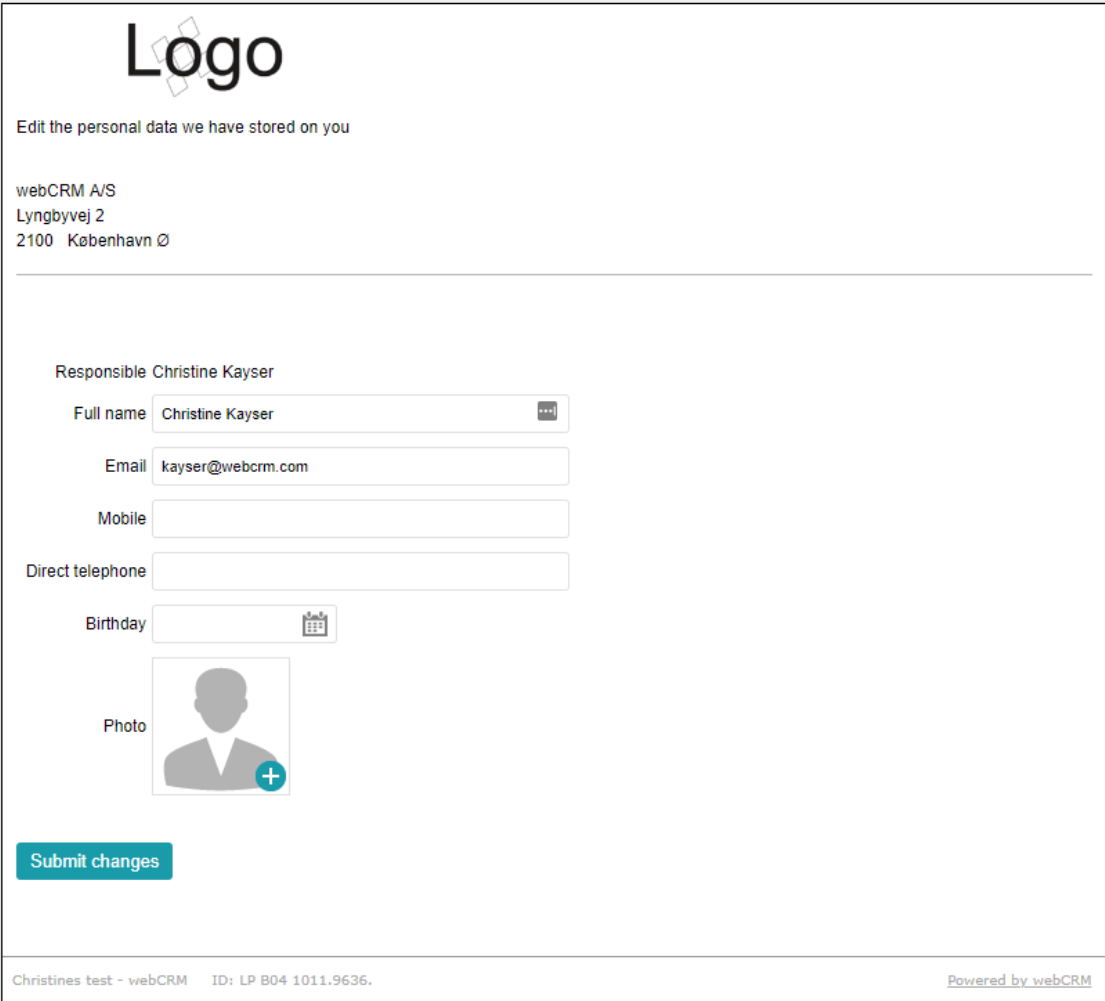


# Give customers access to edit own data using landing pages

According to the GDPR, a company is required to give its customers or leads access and the ability to edit personal information that has been stored by your organisation. WebCRM can be configured to allow access to stored data for customers and leads either as a view or with the ability to edit existing data using landing pages. Landing pages are a functionality that is enabled with the webCRM PLUS-license. In case your webCRM-license does not include landing pages (STANDARD-license) you can still be GDPR-compliant by managing data enquiries from customers or leads by manually finding and sending the data to the enquirers.

## Customer access

The customer and lead access using a landing page could look like this:



The screenshot shows a landing page for editing personal data. At the top, there is a large 'Logo' placeholder. Below it, the text reads 'Edit the personal data we have stored on you'. The user's name 'Christine Kayser' is displayed. The address is 'webCRM A/S, Lyngbyvej 2, 2100 København Ø'. The page contains several input fields: 'Full name' (Christine Kayser), 'Email' (kayser@webcrm.com), 'Mobile', 'Direct telephone', and 'Birthday' (with a calendar icon). There is a 'Photo' field with a placeholder image and a plus sign. A 'Submit changes' button is at the bottom. The footer contains 'Christines test - webCRM ID: LP B04 1011.9636.' and 'Powered by webCRM'.

The landing page can be configured to be more personalised by adding your own logo and changing the design to look more personalised.

Below the top logo it is possible to add personal information that will not be editable. All desired/possible data will be shown below the line and is set up by a webCRM administrative user who decides whether the data is for viewing or editing. When the customer has updated his/her information and clicked the blue button (the description can be edited for this button) data in webCRM will be instantly updated.

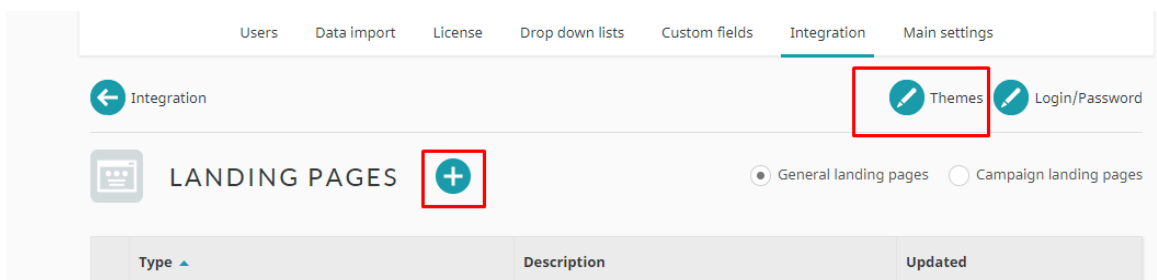
## Setting up the landing page

To set up the landing page it is required that the webCRM user is allowed access level 99.

Go to **configuration/integration/landing pages**.

In the top right corner there is a button called **Themes**. From this menu the design of the landing page is configured as a theme that can be recycled for other landing pages or more themes can be created for different landing pages.

When you are done setting up the theme, click the **Plus-icon** to create a new landing page.



Choose type "edit own data" and give the landing page a Description to be able to differentiate between landing pages.

On the following pageview, you can configure specific parameters for the landing page e.g. when the unique landing page link will expire, which in this case we suggest setting to "never expires". In addition, you can define what the text of the submit-button should be and the message after submitting.

It is possible to configure the landing page to create an Activity however if the landing page is meant to only allow view and update personal data, it is typically not necessary to trigger any such events.

Below these fields, you will find a big white box from where the specific data fields are added to the landing page as either "Read only", "Read/write" or "Mandatory". It is possible to allow access to overviews from webCRM as well.

Data fields		Label(Mandatory) // Comment(Optional)	Default input(Optional)
11070 Organi. Responsible	Read only	Responsible	
13040 Person. Full name	Read only	Full name	
13110 Person. Email	Read/Write	Email	
13100 Person. Mobile telephone	Read/Write	Mobile	
13090 Person. Direct telephone	Read/Write	Direct telephone	
13106 Person. Skype	Read/Write	Skype	
Image	Upload / D€	Photo	

Remember to name all fields and i.e. write a comment. The boxes furthest to the right can be used to add a standard value that will be both be shown and saved to the customer's data when clicking the submit button. In the case of a GDPR-request, it is probably not suitable.

In addition to the shown data fields, you can set up a range of hidden data fields that can be used to add notes/information about the updating of data to the log field on a person or adding a date to a date field. The "hidden fields" are found below the viewable fields.

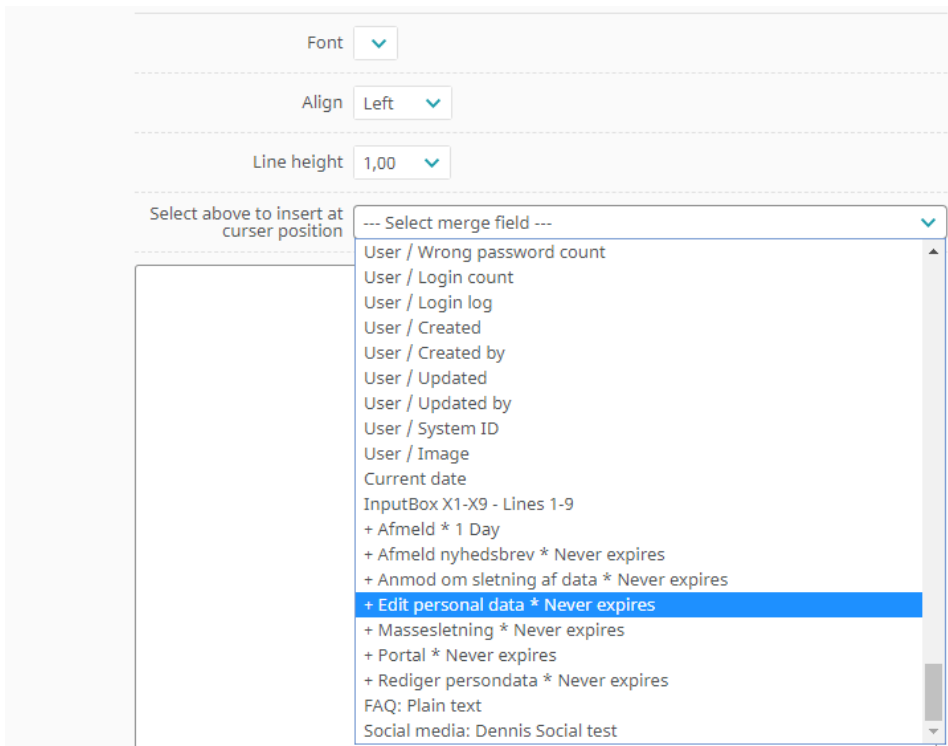
Hidden data	Value
Must be different from input fields	
13119 Person. Log	Updated from landing page.
--- None ---	
--- None ---	

At the bottom of the configuration page you will find several text boxes that will display text on the landing page. Normally the text here is used as help text or as an explanatory text to guide the person through the landing page and perhaps contain company contact details.

Optional texts	
Optional text 1 Top of page	Edit the personal data we have stored on you

## Access to the landing page

The customer can get access to the landing page through a unique link generated by webCRM. The link can be send out as a single email or mass e-mail using email templates containing the merge field for the landing page. Landing page merge fields are found at the bottom of the list of merge fields.



The link will add the description of the landing page as a clickable link (here: Edit personal data) and can be changed from the configuration page for the specific landing page.

In addition to the direct link, it is possible to grant users access to this type of landing pages using a portal page from where the customer can log in and get access to the data without having to use the direct link. Find the guide to landing pages and portals [here](#).