

GDPR for CRM and Sites

After installation is complete, GDPR for CRM app is integrated into slider panels for leads, contacts and companies.

Contact

The following data is anonymized in the contact slider panel: contact details with linked lead, quotes, invoices and repeat leads.

Lead

The following data is anonymized in the lead slider panel: lead details with linked contact, quotes, deals and repeat leads.

Company

The following data is anonymized in the company slider panel: company details, quotes, deals and repeat leads.

Data anonymization.

To start the anonymization, click the "Anonymize Data" button and a pop-up confirmation window will appear inside a slider panel. After that, the real data will be replaced with anonymized data.

To visualize the anonymization process, the final result will be displayed in the opened slider – demonstrating how all the data is presented after anonymization.

Before starting data anonymization, user can save a PDF report on a CRM entity (contact, company or a lead). All the details linked to the selected entity will be included in the report.

In the entities listed above (contact, company, lead), *custom fields* are anonymized as well. Such custom fields for selected CRM entities can be configured in the app settings. Additionally, *entity names* also can be anonymized.

Adding Cookies Notice to Site.

When GDPR for CRM and Sites app is installed on a Bitrix24 user account, the Cookie consent block is registered at Bitrix24.Sites in the "Text" section. This block can be added to the created landing pages.

When a landing page is opened, a pop-up window will appear with a warning about cookie collection on this site and with the cookies list.

In addition, "Cookie Settings" tab is available at the settings page, where you can find the cookies list, add your list own, or delete a cookie.