DYNAMICS 365 CUSTOMER INSIGHTS · JOURNEYS

ServerSys

Consent Management Explained

How consent works in Customer Insights, and the setup decisions to get right first time.

THE KEY DIFFERENCE

Consent is checked against each email address and phone number, not the contact or lead record

Other marketing tools that integrate with Dynamics 365 store consent on the contact record. Customer Insights checks the email address or phone number before every email or text message. By default, it ignores older contact and lead fields, such as "Do not allow bulk emails".

Example contact record

Work email	Opted in
Personal email	Opted out
Mobile number	No consent recorded

Duplicate contacts with the same email address share one consent choice.

Compliance profiles

Your consent rules and preference centre sit in a compliance profile. Add more if your requirements genuinely differ, such as for another brand.



Purposes sit inside each profile: commercial, transactional and tracking.

Topics are an optional extra layer within commercial.

Enforcement model

Determines who receives marketing when an email address or phone number has no consent recorded.

Restrictive. No marketing is sent without consent.

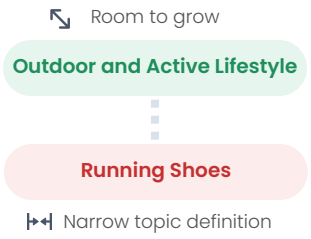
Non-restrictive. Messages are sent unless people opt out.

Check which model your policies allow and what your profile uses before go-live.

Topics

Optional interest areas people can choose from. Opting out of one topic leaves the rest, while a general opt-out stops all messages.

Broad topics leave room for new content without reworking ones people chose.



Tracking

If you switch off tracking, email opens and clicks aren't recorded. To limit tracking per email, switch it off for individual links instead.

When tracking isn't active, journey triggers and branches that look for these signals won't fire.

Commercial or transactional emails

Commercial

Offers · Product launches · Newsletters · Engagement campaigns

Messages only sent where your enforcement model allows, and only with a valid unsubscribe or preference centre link.

Transactional

Order updates · Renewals · Agreement changes · Sign-up confirmations

Messages are sent regardless of previous marketing opt-outs, so never include offers or promotions.

Updating consent in Customer Insights

Preference centre
People update choices from a link in your emails.

Consent centre
Your team can process one-off requests.

Communications tab
Edited directly on contact and lead records.

Load consent
Converts your existing Dynamics email settings.

Import
Bulk-load consent data from a spreadsheet.

RECOMMENDATION

Make one person accountable for consent decisions in Dynamics 365 Customer Insights - Journeys, so your model stays consistent as your audiences and content grow.

Watch a consent management presentation on our YouTube channel