

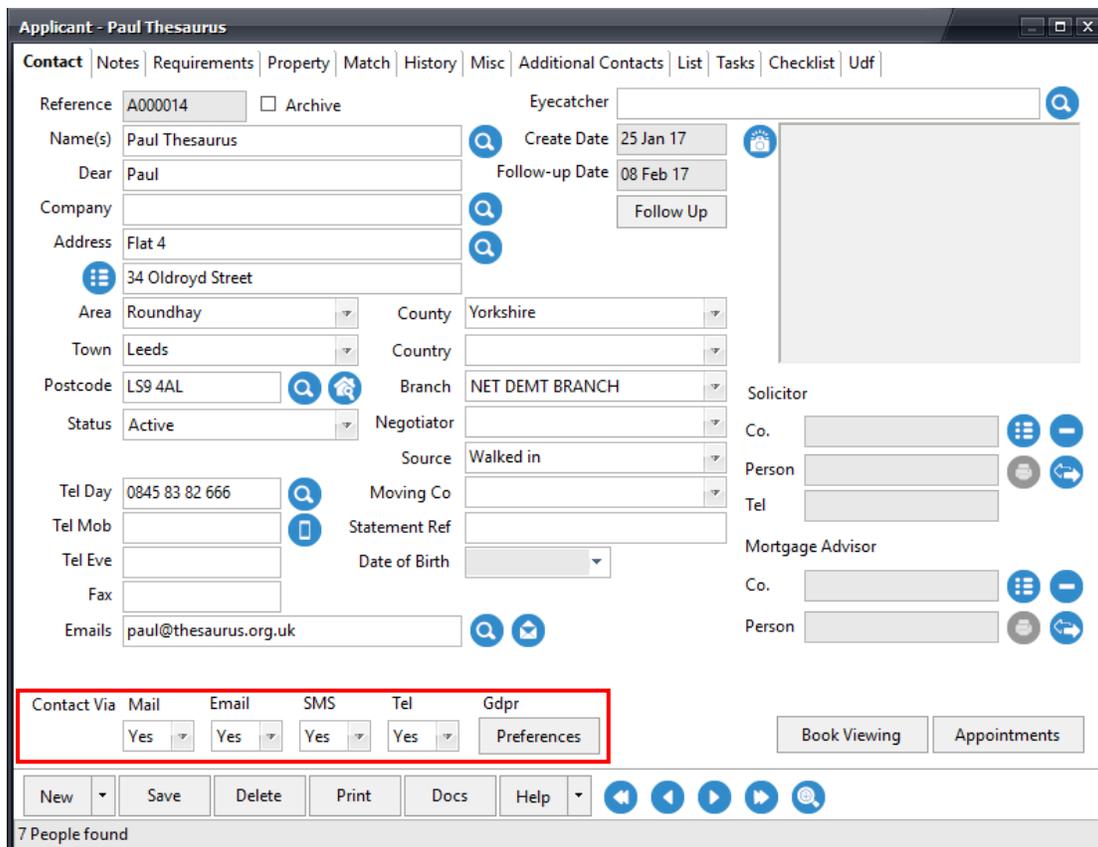
## General Data Protection Regulation (GDPR) Update

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#### 1. Client consent

You are able to control the clients consent on the contact page, via the contact via methods.



Applicant - Paul Thesaurus

Reference: A000014  Archive

Name(s): Paul Thesaurus  Create Date: 25 Jan 17

Dear: Paul  Follow-up Date: 08 Feb 17

Company:  Follow Up

Address: Flat 4

34 Oldroyd Street

Area: Roundhay  County: Yorkshire

Town: Leeds  Country:

Postcode: LS9 4AL  Branch: NET DEMT BRANCH

Status: Active  Solicitor:

Tel Day: 0845 83 82 666  Co.:

Tel Mob:  Person:

Tel Eve:  Tel:

Fax:  Mortgage Advisor:

Emails: paul@thesaurus.org.uk  Co.:

Person:

Source: Walked in

Moving Co:

Statement Ref:

Date of Birth:

Contact Via: Mail: Yes  Email: Yes  SMS: Yes  Tel: Yes  Gdpr: Preferences

Book Viewing  Appointments

New  Save  Delete  Print  Docs  Help

7 People found

If the client consents to receive marketing data, the time/ date will be recorded on their record. Likewise, if they 'opt out' and no longer wish to receive information, the time/date will also be recorded. This will provide a clear record of when permission was granted or removed, including how this was communicated.

Applicant - Jane Hemsworth

Contact | Notes | Requirements | Property | Match | **History** | Misc | Additional Contacts | List | Tasks | Checklist | Udf

All  Viewings  Offers  Historic Notes  Correspondence  Tasks  Diary  Opted In  Opted Out

Date & Time	User	Comments
30 Apr 18 05:18 PM	Admin	Opted: in - To: 3rd Part Marketing Company - Via Method: Email
30 Apr 18 05:18 PM	Admin	Opted: in - To: NET DENT BRANCH - Via Method: Letter
30 Apr 18 04:55 PM	Admin	Opted: Out of receiving property updates via telephone
30 Apr 18 04:55 PM	Admin	Opted: Out of receiving property updates via email
30 Apr 18 04:55 PM	Admin	Opted: Out of receiving property updates via mail
30 Apr 18 04:55 PM	Admin	Opted: Out of receiving property updates via sms
30 Apr 18 04:47 PM	Admin	Email subject:GDPR Laws
27 Apr 18 04:12 PM	Admin	Email subject:GDPR Laws
27 Apr 18 03:28 PM	Admin	Email subject:GDPR Laws
27 Apr 18 11:39 AM	Admin	Email subject:test
27 Apr 18 11:38 AM	Admin	Email subject:test
25 Apr 18 04:58 PM	Admin	Jane Hemsworth sent text message: Dear Jane Please call Admin on 1111 - NET DENT BRANCH
06 Apr 18 03:10 PM	Admin	Email subject:test
27 Mar 18 03:03 PM	Admin	Email subject:Insert Text Random Text Insert Text Random Text
27 Mar 18 03:01 PM	Admin	Email subject:test
27 Mar 18 11:25 AM	Admin	10
26 Mar 18 01:23 PM	Admin	Email subject:test
06 Mar 18 12:00 PM	James	Accompanied viewing - 17 Arthur Rd

Record last updated on 25 Apr 18 16:59:31 by Admin

Display History From 30/04/2017  Ignore

18 History Records

You can use the default email templates to allow for clients to 'edit' their marketing preferences and fully unsubscribe from any communications. Universal will update automatically and apply the new preferences when these are selected from the link in the emails.

Email

Templates

- Blank Email Template.html
- GDPR - Agent.htm
- GDPR - General.htm
- GDPR - Third party.htm
- SAMPLE - applicant email.htm
- SAMPLE - applicant followup.htm
- SAMPLE - appointment confirmation.htm
- SAMPLE - blank.htm
- SAMPLE - HIPs referral.htm
- SAMPLE - mortgage advice.htm

Generated

2018-05-01 10-43-54 GDPR - Third party.htm

Signature Admin

Send Email - 2018-05-01 10-45-05 GDPR - General.htm

Save As Background Colour

To paul@thesaurus.org.uk

Bcc

Subject GDPR Update

Design Source

Dear Paul,

With the new data laws changing on the 25th May 2018, we need to know if you still want to hear from us and what you want to hear about.

**Correspondence from THESAURUS TECHNOLOGY**

Select the relevant link below to update your preferences:

Please Carry on sending - [Click here](#)

Please Stop sending - [Click here](#)

Please get in touch if there are any issues.

Regards,

Paul  
Support Desk

Email has been saved

Please set your preference for property match updates

Tick to opt in and leave unticked to opt out

Mail  Email  Tel  SMS

There's a report you can run off to see who has been opted out. Via reports > GDPR.

The screenshot shows a software interface with a sidebar on the left containing a menu with items like Property, Rentals, Management & Financial, People History, KPI Charts, Valuations, Viewings, Performance, User Logins, and GDPR (highlighted). The main window is titled 'Opt In/Out History' and contains a table with the following data:

Date & Time	Person	Company	Type	Method	User	Notes
26/04/2018 14:14:05	Anonymous	NET DEMT BRANCH	Opted In	Email	Admin	Opted: in - To: NET DEMT BRANCH - Via Method: Email
27/04/2018 12:24:33	Paul Sparrow	Supplier 2	Opted Out	Web	Admin	Opted: out - From: Supplier 2 - Via Method: web
27/04/2018 12:26:38	Paul Sparrow	NET DEMT BRANCH	Opted In	Web	Admin	Opted: in - To: NET DEMT BRANCH - Via Method: web
30/04/2018 17:18:15	Paul Thesau...	NET DEMT BRANCH	Opted In	Letter	Admin	Opted: in - To: NET DEMT BRANCH - Via Method: Letter
30/04/2018 17:18:16	Paul Thesau...	3rd Part Marketing Company	Opted In	Email	Admin	Opted: in - To: 3rd Part Marketing Company - Via Method: Email

## 2. B2B marketing partners

The new section GDPR, added to contact page within Universal will allow you to record if your clients have 'opted in' to your selected marketing partners. You will be able to record all of the marketing partners you are associated with.

The screenshot shows a contact form with fields for 'Contact Via', 'Mail', 'Email', 'SMS', 'Tel', and 'Gdpr'. Each field has a 'Yes' dropdown menu. The 'Gdpr' field has a 'Preferences' button highlighted with a red box. Below the form are buttons for 'New', 'Save', 'Delete', 'Print', 'Docs', and 'Help'. At the bottom, it says '7 People found'.

The consent via shows how the person gave consent, and the date it was last updated.

To add or change a company, select edit companies.

**Consent Preferences**

Display mail merge tags and links

	Company	Consent Via	Date
<input checked="" type="checkbox"/>	NET DEMA BRANCH	Letter	30/04/18 17:18:15
<input checked="" type="checkbox"/>	3rd Part Marketing Company	Email	30/04/18 17:18:16

Click the add button in the bottom left to add a new company. To edit an existing company, just make the changes and click save. If a company is no longer required, untick the active tick box.

The opt in and opt out tags can be used on your email template to link to the specific company.

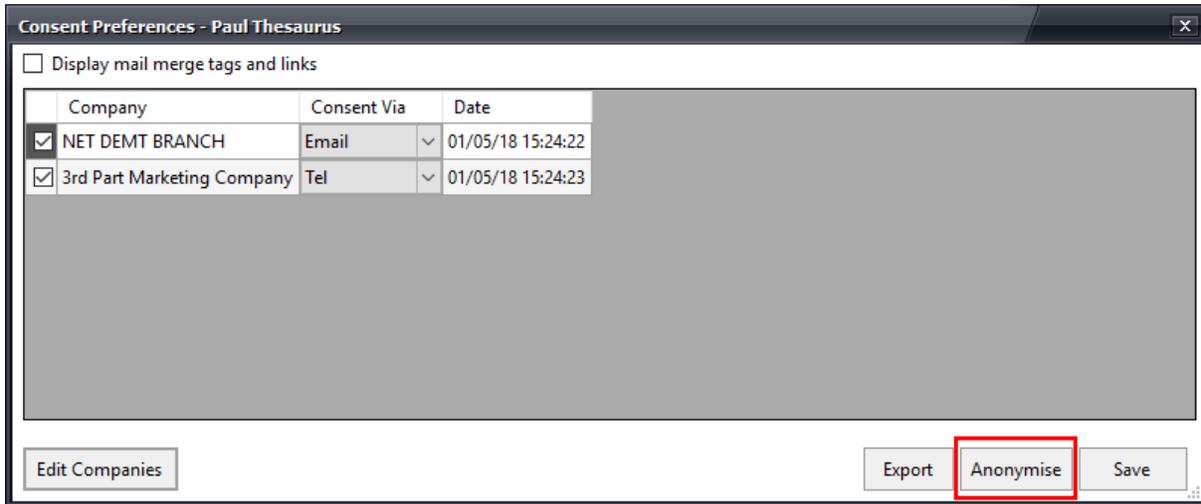
**Manage Preferences**

Id	Company	Active	Opt In Tag	Opt Out Tag
0	NET DEMA BRANCH	<input checked="" type="checkbox"/>	#optin-0#	#optout-0#
1	Supplier	<input type="checkbox"/>	#optin-1#	#optout-1#
2	Windows and doors	<input type="checkbox"/>	#optin-2#	#optout-2#
3	3rd Part Marketing Company	<input checked="" type="checkbox"/>	#optin-3#	#optout-3#

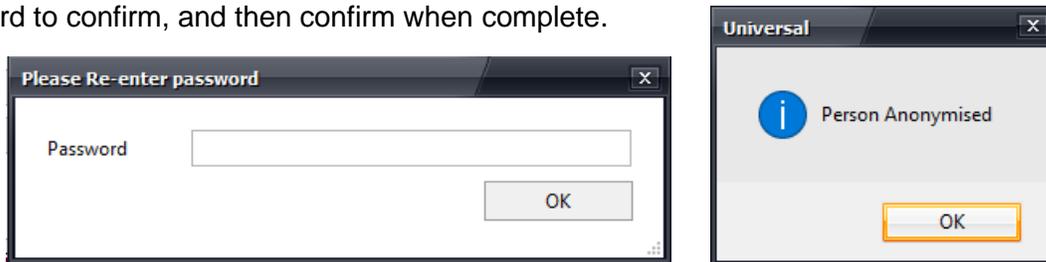
Use email tags #optinall# or #optoutall# to generate url's to opt in or out of all companies. Use #optinurl-matches# to generate a link to opt in or out of property updates and to set the method of contact.

### 3. Anonymisation of records

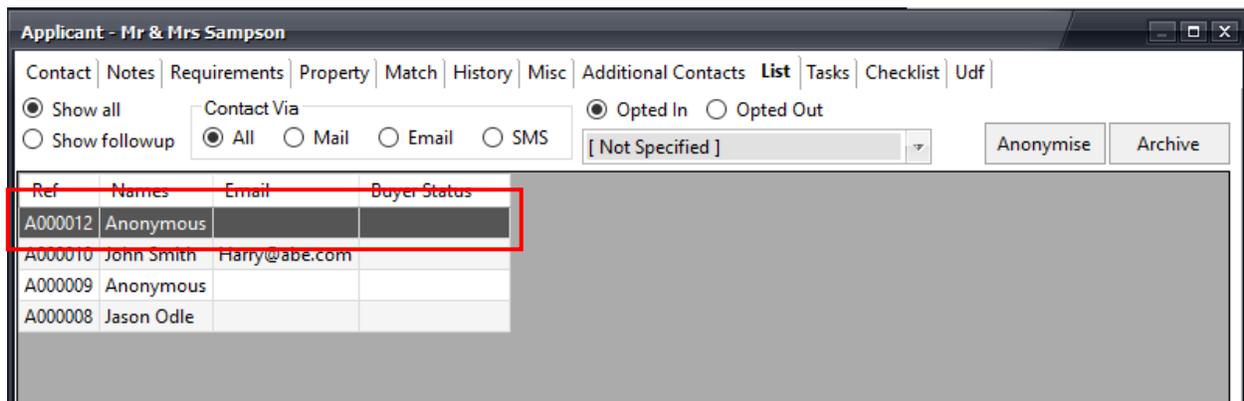
Clients are able to request that their record is stored in the system anonymously. This new feature is available in the GDPR section on the contact page. It will remove any data stored for the person, however will leave any financial transactions linked to the person in place for your records.



To anonymise a record, you will need to log into Universal as the Admin user. Select the anonymise button, a warning will appear which you will need to accept or reject. It will prompt you for your password to confirm, and then confirm when complete.

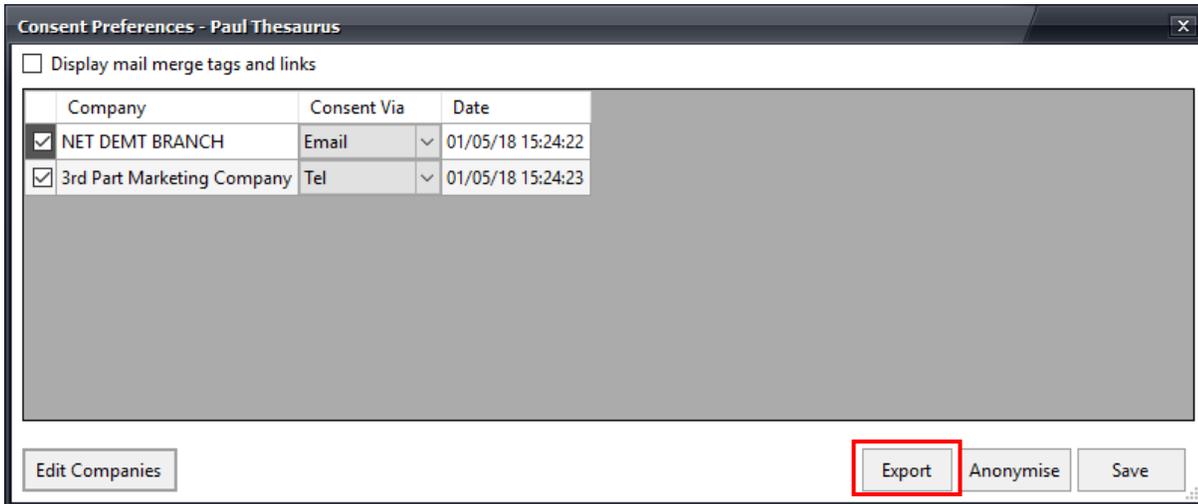


To view the record again, you will need to go to the list tab, select filter, and then select the show archived option.

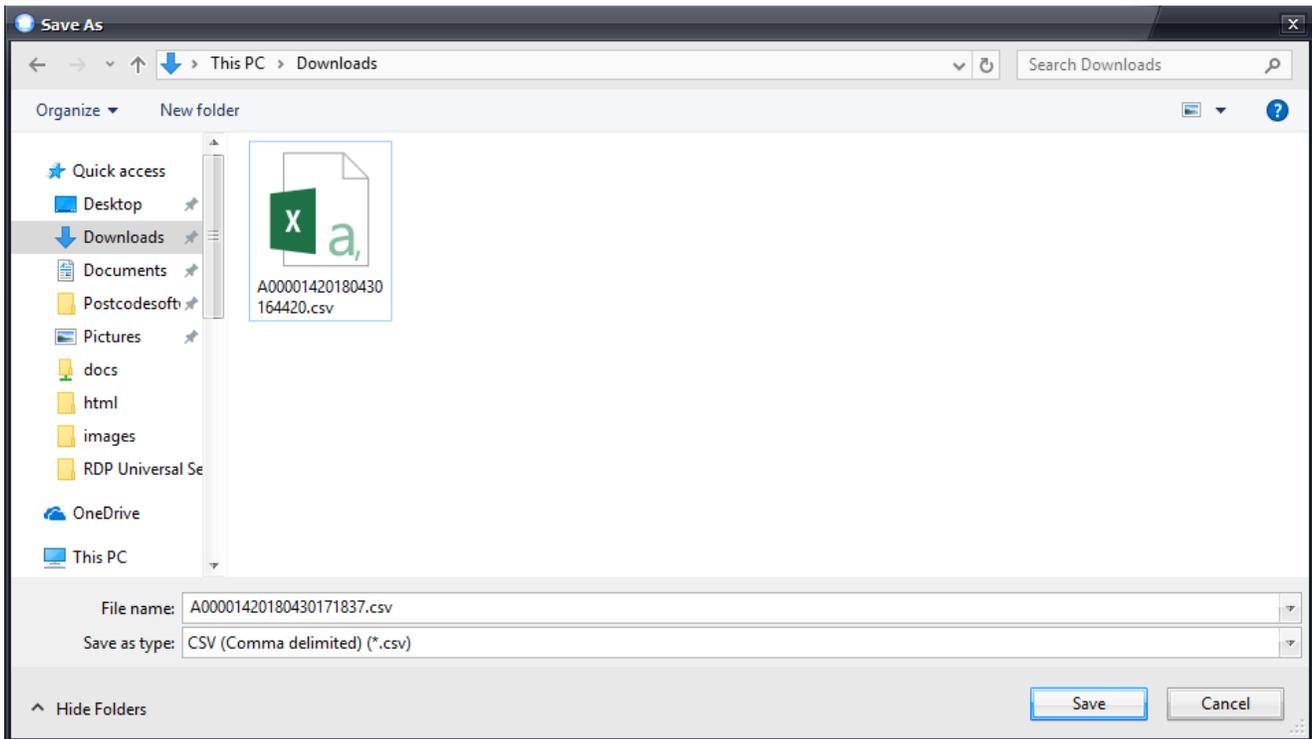


#### 4. Export personal data

Clients will have the right to request and transfer their own data into a different IT location. Within Universal you can export the individual client data into a CSV file (opens in Excel). This is an openly accessible file format.



To export data, go to the contact page, and select export. Choose a file name and location to save it to, then select save.



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## 5. Staff access control

You will need to ensure staff are up to speed on the new legislation with regards to contacting clients. Using the 'access controls' in Universal, you can limit which members of staff have the ability to send emails, SMS or generate documents.

Staff members can also be limited on what data or areas of the system they have access to.

To set up user access levels, go to tools, maintenance (system settings), select user ID's, then select access levels.

The screenshot shows the 'Maintenance' window with a menu bar containing: Lists, **Userid's**, System Settings, Import, DB Maintenance, Prop Search, Features, Initialise, App Reg, Slideshow, Web Reports, UDF, Blog. Below the menu is a table with columns 'User ID' and 'Email':

User ID	Email
Admin	information@thesaurus.org.uk
James	information@thesaurus.org.uk
John	information@thesaurus.org.uk

Below the table are form fields for user details: Username (John), Password, Email address (information@thesaurus.org.uk), Email name (J Smith), Mobile No, Email signature (J Smith), and Branch (NET DEMT BRANCH). A profile picture placeholder shows a man with the text 'example'. A red box highlights the 'Access Levels' button. At the bottom right is a checkbox for 'User Disabled'. At the bottom left are buttons for 'New', 'Save', and 'Delete'. At the bottom right is a 'Help' button with a dropdown arrow. A footer note says: 'Click New to add a user or select a user to modify or delete'.

## 6. Portal leads

Client data that syncs into Universal via property portals will automatically be 'marketing off' until such a point when consent has been obtained from the client. This can be done via an 'opt in' email generated via the software.

For more information on using the system click on Help > Contents in Universal or visit our website [www.thesaurus.org.uk](http://www.thesaurus.org.uk) to view the help videos.