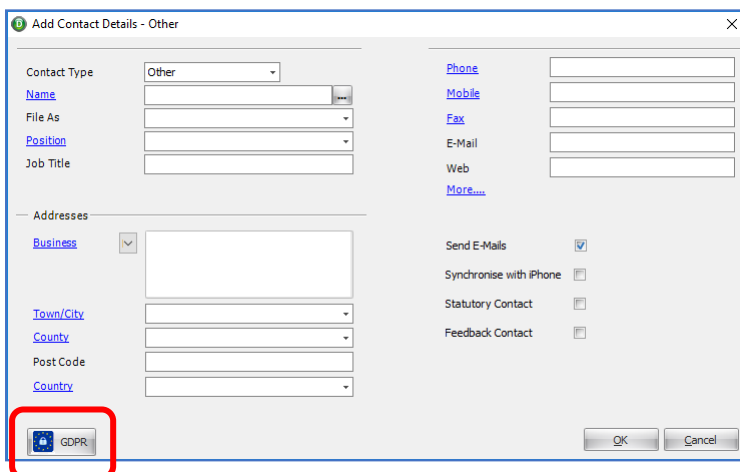
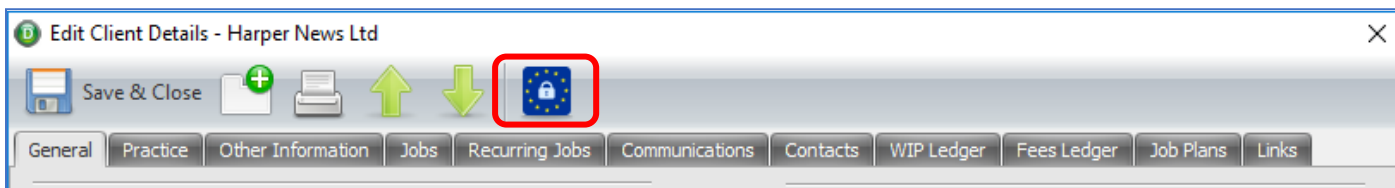


GDPR CHANGES IN DRIVE CRM & Practice Management

Version 3

1. CLIENTS AND CONTACTS

A new GDPR button will be visible on the Add/Edit Client & Contact screens (below).

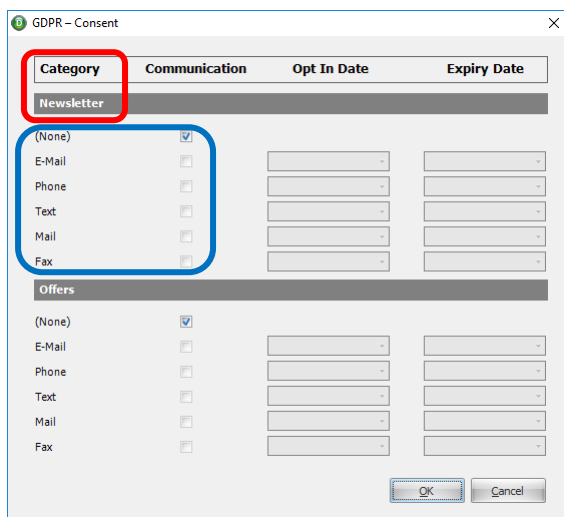


There will be a 'Category' of communication, for example Newsletter & Offers, below. You will be able to add/edit the list of available categories.

There will be 'Communication' mechanism options, E-Mail, Phone, Text, Mail and Fax. You will be able to select the mechanisms which are appropriate to your business and/or client.

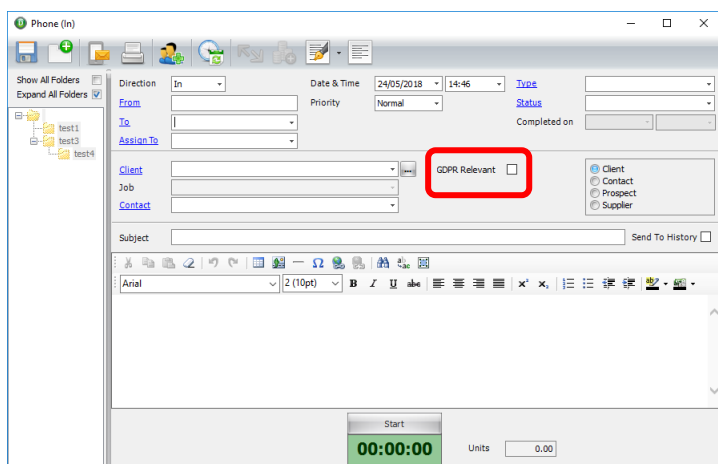
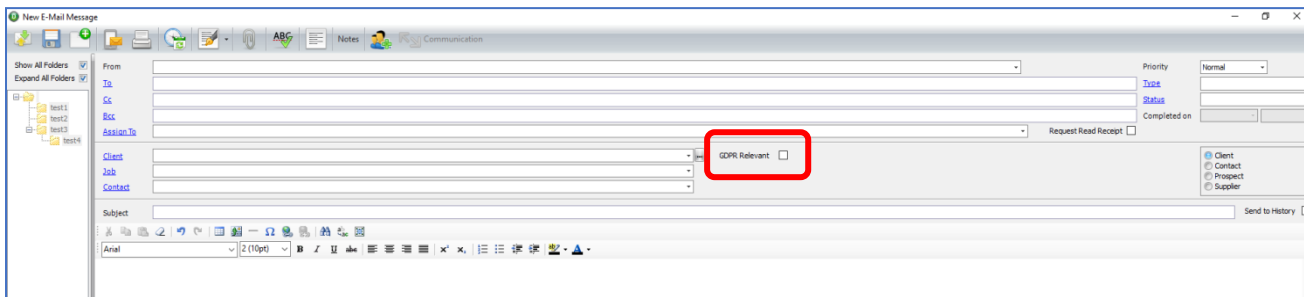
There will be fields for 'Opt-In Date' and 'Expiry Date' (for when the duration of such opt-ins becomes known).

The staff member that updates these fields will be recorded along with a date and time updated.



2. COMMUNICATION

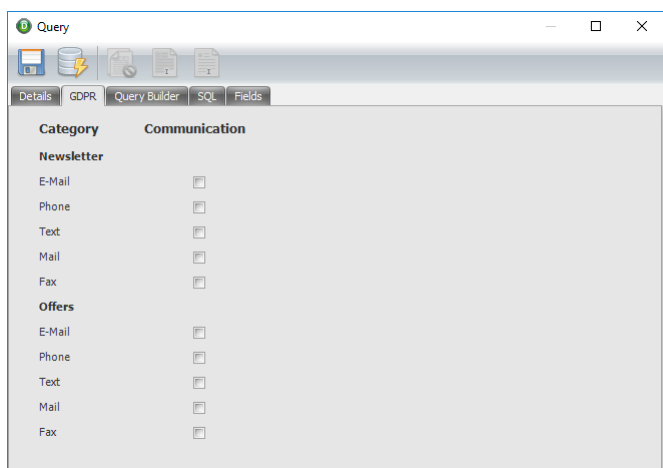
You will have an option on all different forms of communication to mark it as GDPR relevant, below



Including scanned documents, meetings, tasks etc.

1. DATAMINING

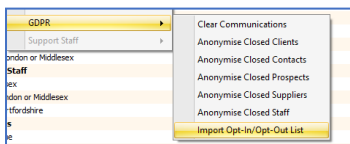
When using the datamining functionality in the system to communicate with your clients, you will have a new tab for GDPR, which when selected will show the same screen as on clients/contacts, allowing you to select only the clients/contacts that have opted in by the specific communication method selected.



2. TOOLS, GDPR

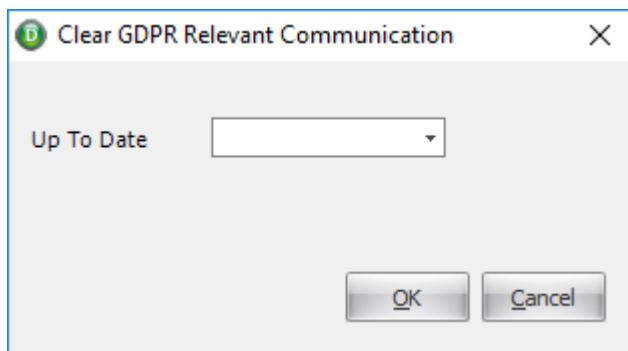
In DRIVE Tools, you will also have the following options

1. Clear Communications
2. Anonymise Closed Clients, Closed Contacts, Closed Prospects, Closed Suppliers and Closed Staff
3. Import Opt-In/Opt-Out List



1. CLEAR COMMUNICATION

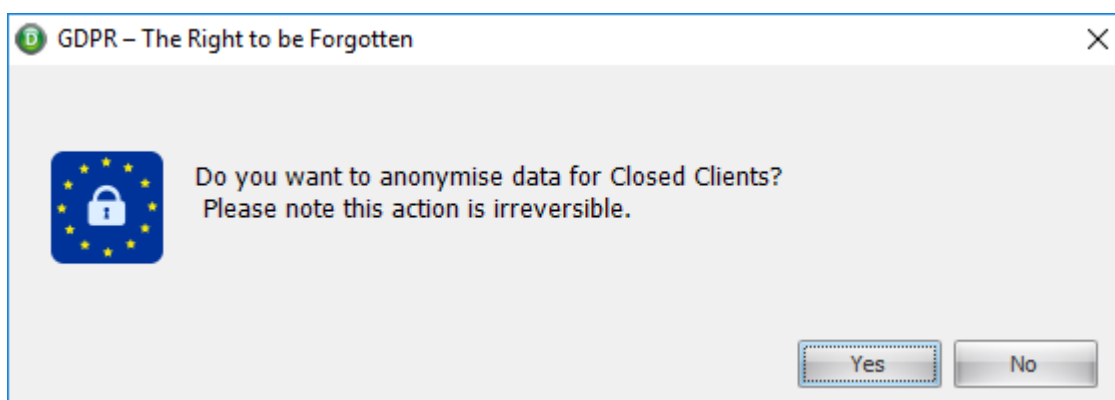
You will need to enter in a date up to which you want to clear out the communication. This will only clear out communications that are marked as GDPR relevant.



There will also be options to a) clear out all communication, regardless of GDPR relevance and b) clear out communication on a specific client/contact.

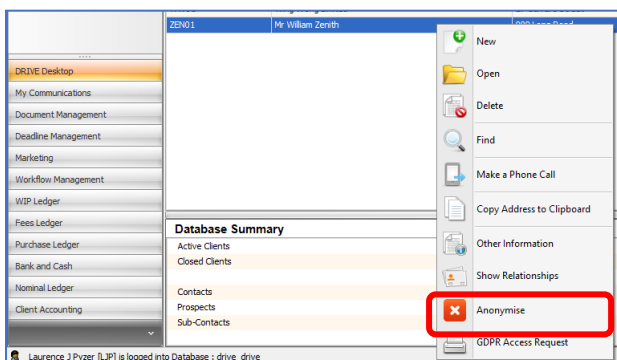
2. ANONYMISE CLOSED CLIENTS, CONTACTS, PROSPECTS, SUPPLIERS AND STAFF

You will have options to anonymise all closed clients, all closed contacts, all closed prospects, all closed suppliers and all closed staff, where it is not possible to delete these due to linked information. This will 'X-Out' all relevant personal details, including Other Information fields.



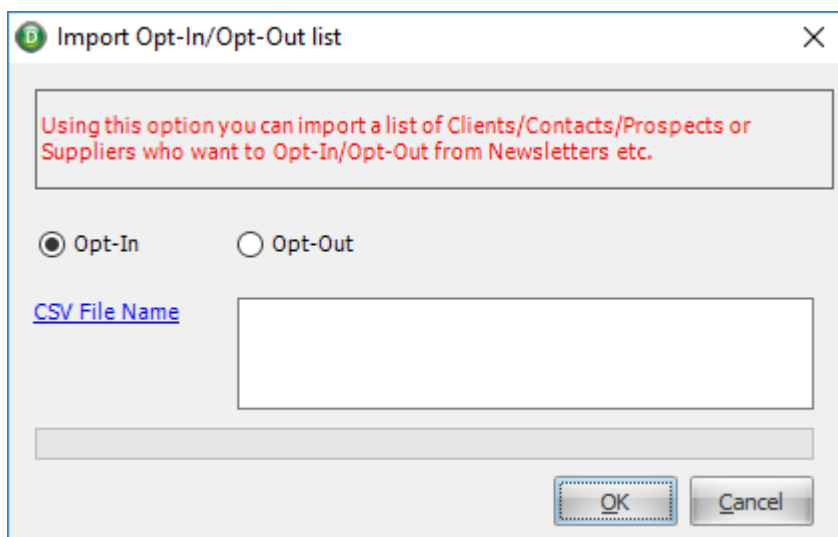
These options are IRREVERSIBLE.

You also have the option at the individual client/contact etc level to anonymise.



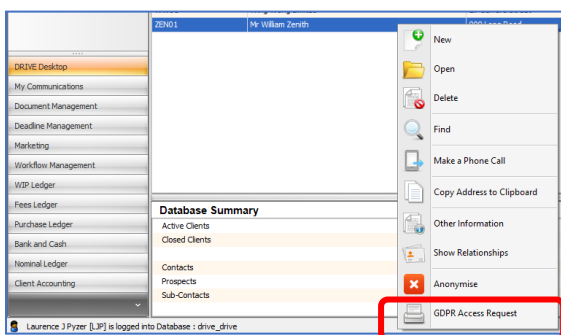
3. IMPORT OPT-IN/OPT-OUT LIST

This option allows you to import 'Opt-In' or alternatively 'Opt-Out' a CSV file of e-mail addresses, this will 'Tick' or 'Untick' the relevant mechanism (or all mechanisms) and the appropriate category (or all categories). This will also record the staff member running the import and the date and time updated.



3. GDPR ACCESS REQUEST/REPORT

Where a client makes a data access request you will be able to run this report, by highlighting the client, right clicking and selecting GDPR Access Request, below.



This report will show all the client general data, personal contact information as well as Communications history (where the communication is marked as GDPR relevant). It will also include any 'Other Information' fields which you marked as GDPR relevant, below.

The screenshot shows the 'Client Other Information' dialog box with the following settings:

- Field Description: Salary
- Type: Number
- Decimal Places: 2
- Mandatory:
- Under which Tab Page: Key Review Information
- Applicable For: Client, Contact, Prospect
- Entity Type: Audit Exempt Company, Charity, Club, Company Limited By Guarantee
- Default: 0.00
- Apply Access Right:
- Access Group: Accounts, Junior, Manager, Partner
- GDPR Relevant: (highlighted with a red box)

4. GDPR EVENTS

There will also be a log/audit trail, where you will be able to report on any exports from the system including datamines (even if these were subsequently removed), subject access requests, rights to be forgotten requests etc.

The screenshot shows the DRIVE (Version 3.0) interface with the 'GDPR EVENTS' section highlighted. The sidebar menu item 'GDPR Events' is also highlighted with a red box.

GDPR EVENTS					
EVENT DATE	EVENT	DETAILS	STAFF	STATUS	CREATED ON