



GDPR / Privacy Portal User Guide

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Introduction

The aim of this document is to assist you with the set-up process for your new privacy portal. If you wish to know more about what is included in this product release and gain a better understanding of the new features; it may be worth first reviewing our release notes.

Portal Configuration

Set Up Steps

To make the set-up process as simple as possible we are providing three sets of instructions. Most intermediaries will be able to follow the simple instructions in setup path 1, however for larger firms, groups of firms or more advanced setups can use setup path 2 and 3.

In each case the steps to get your portal live are as follows

1. Set up one or more portals
2. Add an introductory paragraph to display at the top of your portal
3. Configure your consent questions for each portal
4. Configure your email templates for single client requests
5. Configure your email templates for bulk consent requests
6. Add links to all of your DPA and GDPR statements
7. Begin using the new functionality to gather consent Firstly, you need to determine which instruction set to follow.

Setup Path 1 - Simple One Brand set up

Follow these instructions if you are a straightforward business operating under a single trading style. This path will also be suitable if you are part of a group of companies where each company has its own separate 360 database.

We expect these instructions to suit the vast majority of businesses.

Setup Path 2 - Simple Multi Brand Setup

If you operate multiple trading styles within the same 360 Database and each trading style operates largely independently of other, then this is the path for you.

Setup Path 3 - Advanced Setup Procedure

A complete service then this is the path for you. Usually this is where there is a group of companies with similar names, for example, Sprogget & Sylvester – Wealth
3

and Sprogget & Sylvester – Mortgages might want to share a single Sprogget & Sylvester Portal.

Detailed portal configuration

Setup Path 1 – Simple one brand set up

Set up a portal

Firstly, log into 360 Lifecycle – Office and go to the maintenance tab. From the compliance menu there is a new item named “Privacy Portal Configuration”. Clicking this will show another menu item name “Portal Setup”.

You will be presented with the screen shown in Figure 1.

Choose Single Brand Portal and click “OK”. You will be presented with the following portal set up screen:

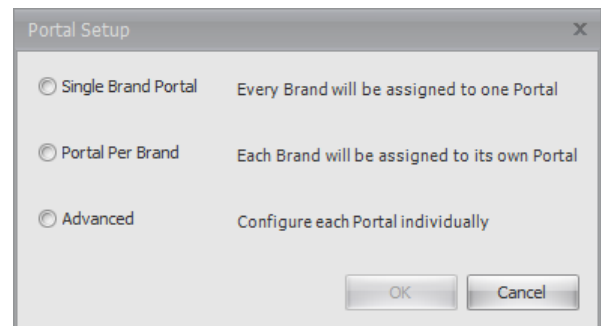


Figure 1- Portal Setup - Helper

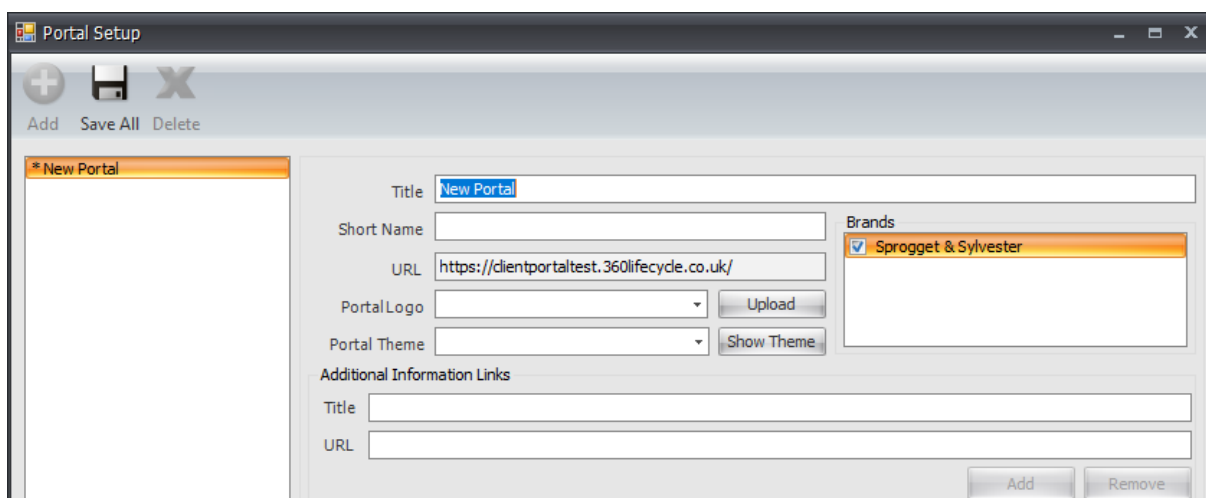


Figure 2 – Portal setup

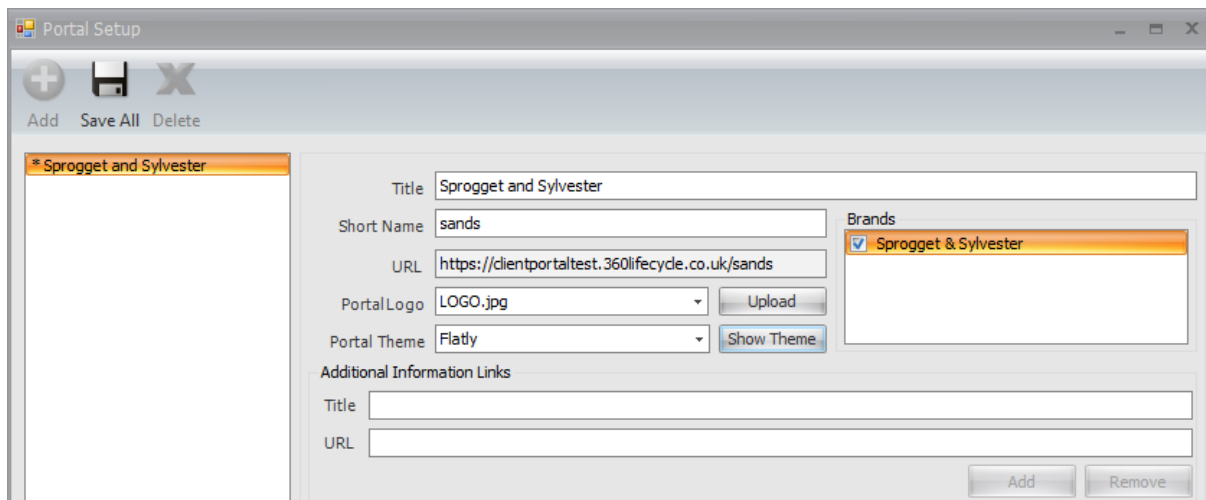
Enter the title of your portal. Typically, this will be your company name.

Now choose a Short Name, this is a small piece of text that is included in the URL of the portal. This allows the system to display the correct branding for your business. As it also forms part of the URL your clients can have more confidence that they are going to the correct place.

Next choose a portal logo. This will normally be the same one you use to display on Reports. Should you need to upload a different Logo you can do so here.

Your portal comes preconfigured with a number default themes or styles. Choose a theme that most closely matches your brand image and one where your logo does not clash with the colour scheme. There is a preview button here so you can have some idea what each theme and colour scheme look like. Don't worry you can always come and change this later if you need to.

Your screen should now look something like this.



The screenshot shows a 'Portal Setup' window with the following fields and options:

- Title:** Sprogget and Sylvester
- Short Name:** sands
- URL:** https://clientportaltest.360lifecycle.co.uk/sands
- Portal Logo:** LOGO.jpg (with an 'Upload' button)
- Portal Theme:** Flatly (with a 'Show Theme' button)
- Brands:** A list containing 'Sprogget & Sylvester' which is selected with a checkmark.
- Additional Information Links:** Two empty text boxes for 'Title' and 'URL' (with 'Add' and 'Remove' buttons below).

Figure 3-Portal Setup Complete

Hit the Save button and you are done. You can now close this screen.

Configure your consent questions

A new series of menu items will have now been added to the menu to allow you to further customise the portal you just configured.

Click the “Portal Content” menu item.

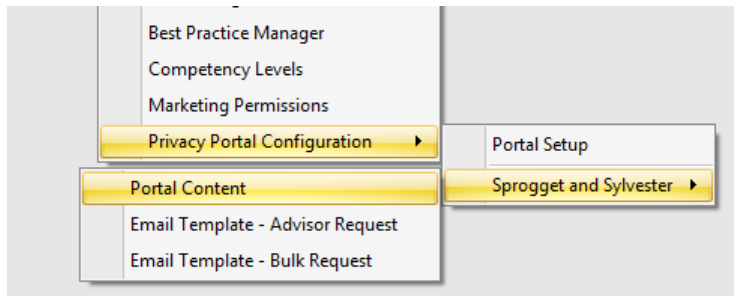


Figure 4- New Portal Menu

You will be presented with the following screen.

Go ahead and enter an introduction. Again, don't worry if you don't get this right first time, you can always come back and change it later.

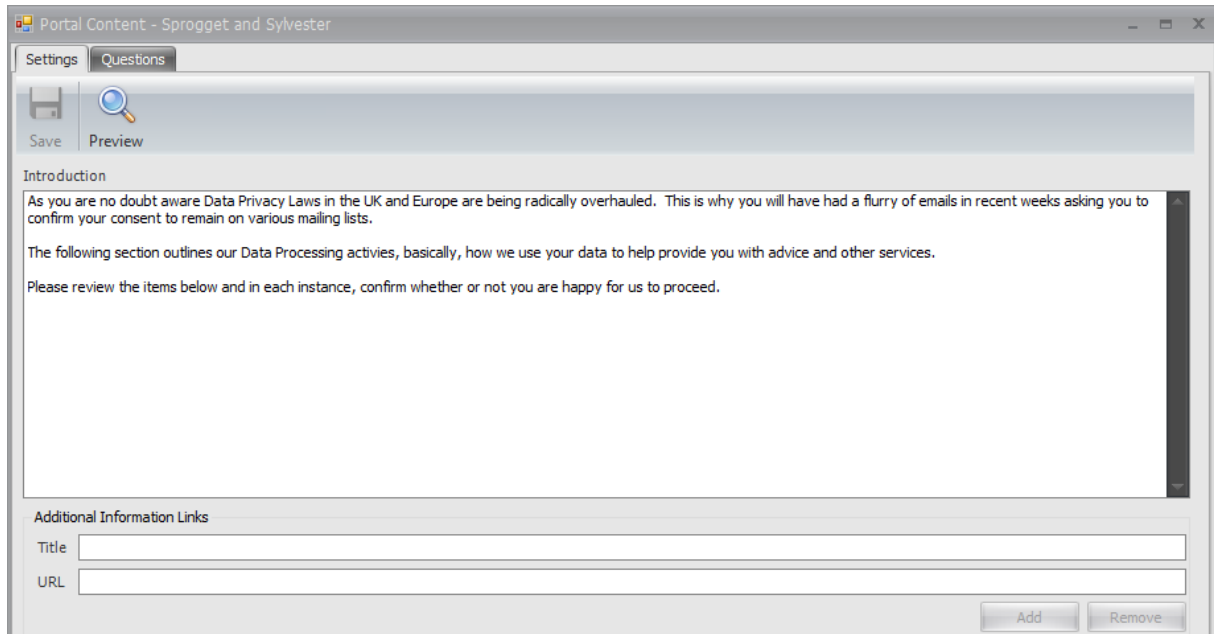


Figure 5 – Enter Website Introduction

Now go to the second page titled “Questions” and click the Add button on the toolbar.

Go ahead and type in the details of the consent question you wish to ask of your clients and click save. At this point your screen should look something like this....

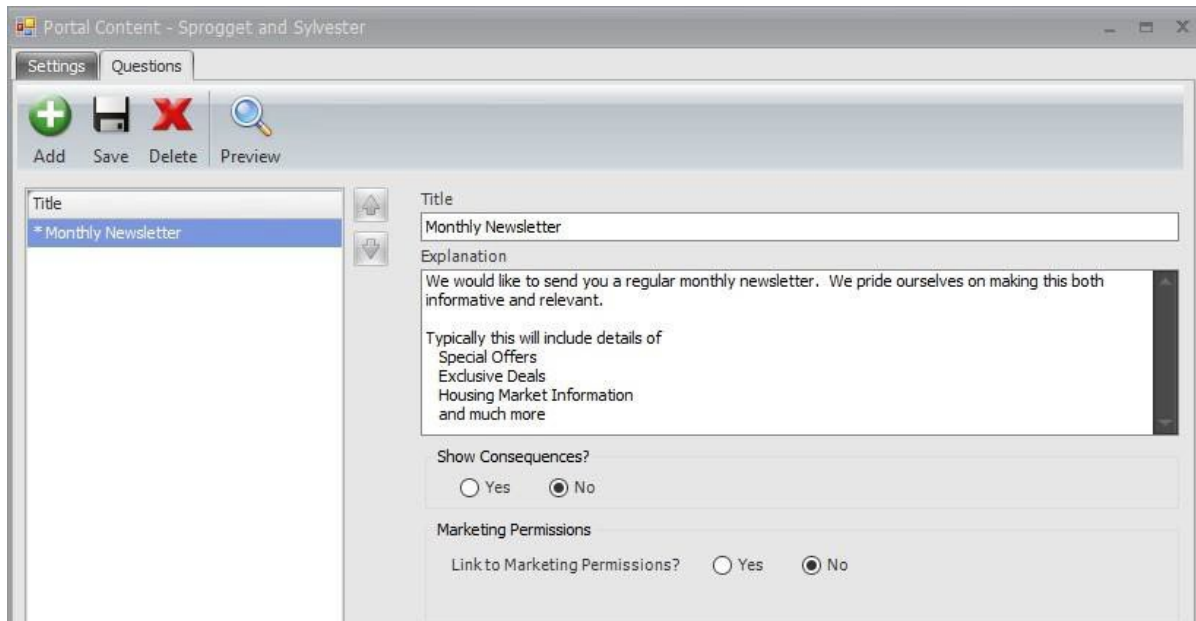


Figure 6-First Consent Question

At this point you can click the Save button to confirm your changes.

To see your new portal website for the first time, click the preview button. The system will launch your browser and show you a preview of your website exactly how your client will see it when they log in.

It should go without saying that this is example text only, it has not been checked for compliance and is only there to make it easier for us to explain the set-up process

In our example the preview currently looks like this:

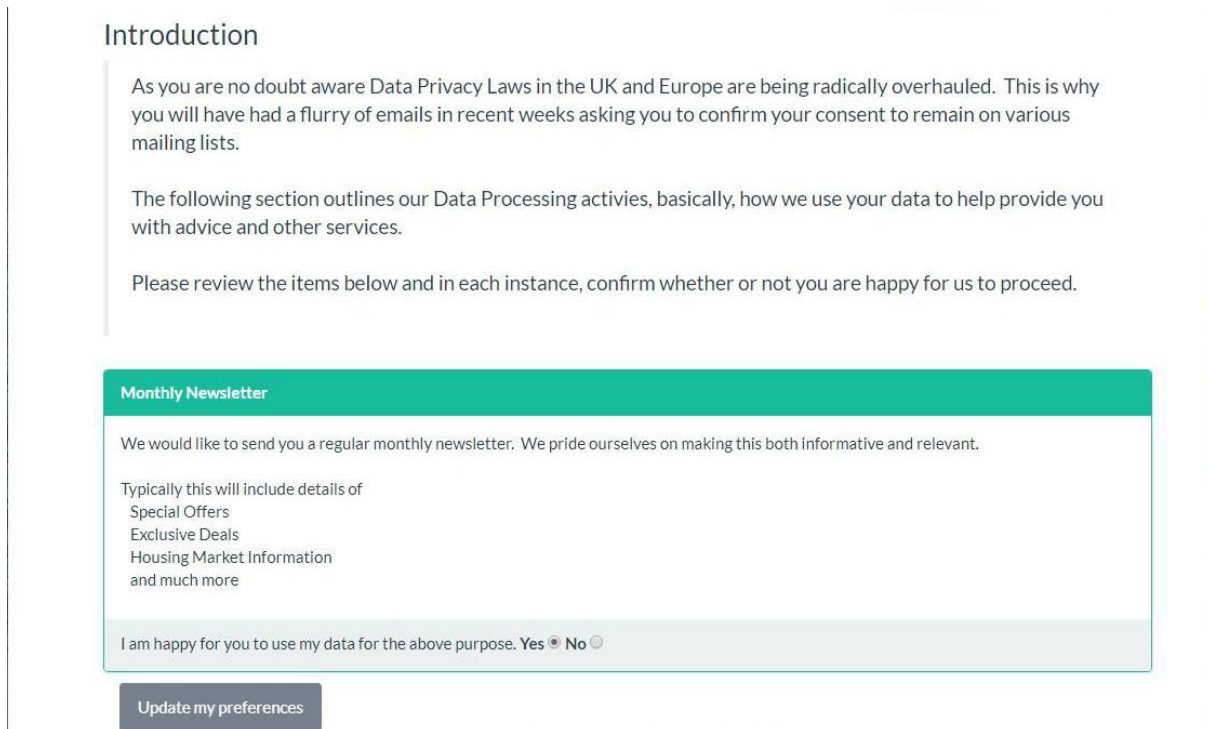


Figure 7- Website Preview

This is a good time to check a few things. It's better to check now than to find out it looks awful after you have invited thousands of clients to confirm their consent.

- Does the introductory paragraph look ok on the web page?
- Does your logo look ok or does it need resizing?
- Have you chosen a suitable theme?

If you spot anything on the page that needs tweaking then simply go back through these instructions and change anything that needs changing.

Should you wish to add further consent questions you can do this now. You can also choose to display an additional message that will be shown to your client if they refuse consent.

You can see how this looks in the configuration screen below.

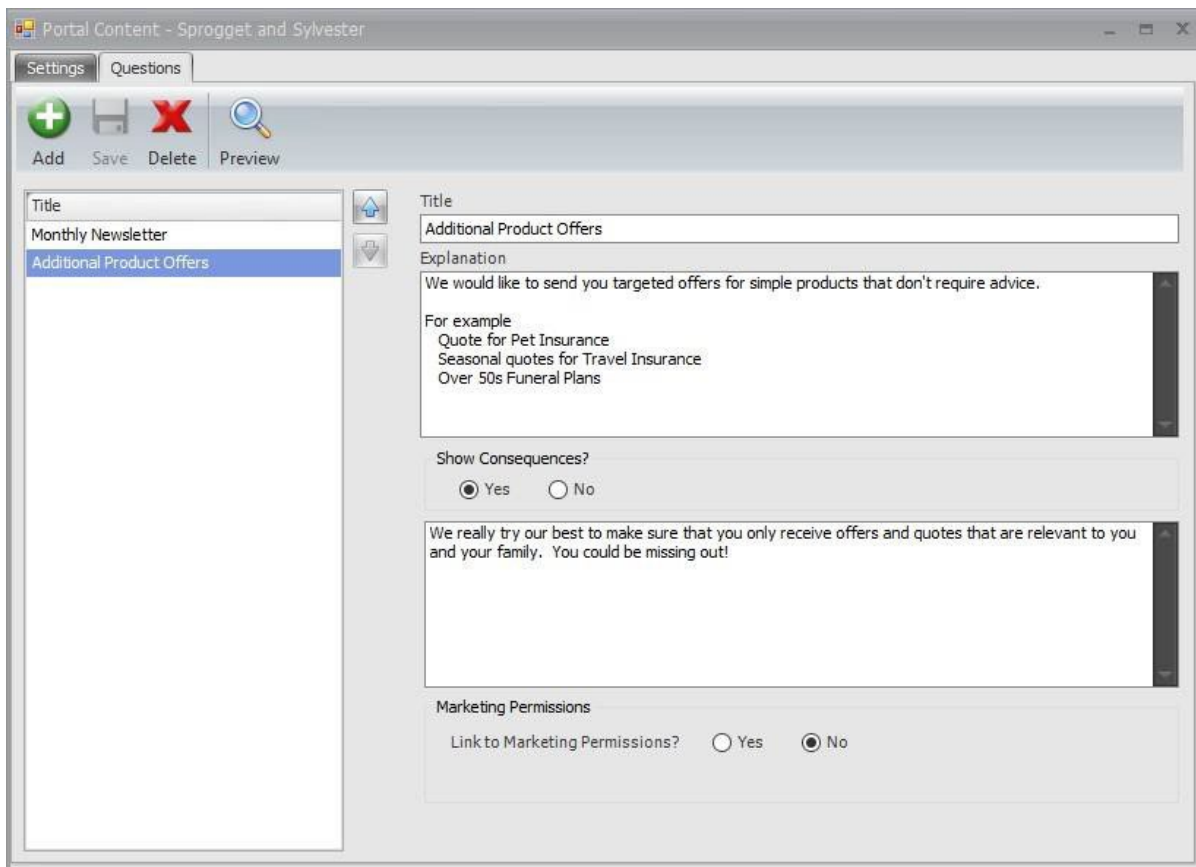


Figure 8-Additional Question & Consequences

Hitting the save button followed by the preview button will allow you to review your changes at any point. In the preview, this 2nd question now looks like this when you answer no to the consent question.

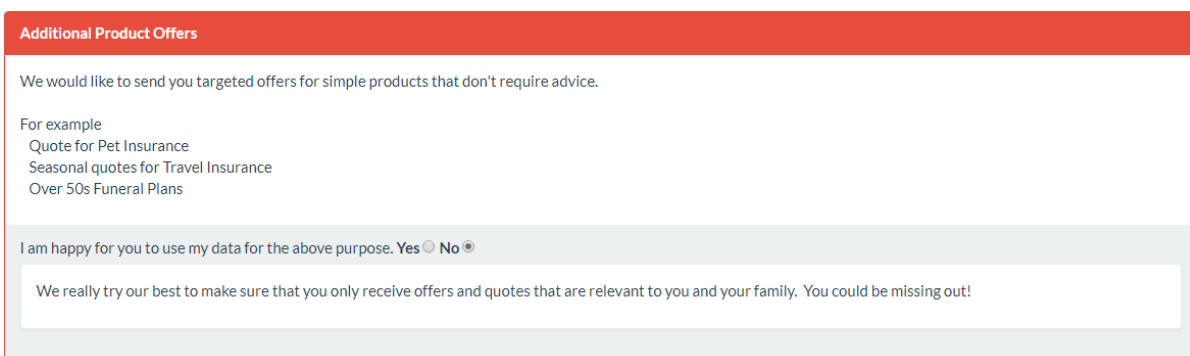


Figure 9-Consequences

Once you have set up all your consent questions you can move onto the next step.

Add Links to Additional Documents

If you wish to add additional documents to the privacy portal you can do this here otherwise move onto the [next step](#).

Examples of document links you may wish to add:

- Privacy Notice
- Data Retention Policy
- Standard Terms of Business
- Company Brochure
- Link to your Website

If you are still in the portal content screen return to page one. Otherwise re-open the screen as shown in [Figure 4](#).

In turn enter a title for each document and a URL pointing to the location then click the add button.

After adding all your links to relevant documents your portal setup screen should look something like this.

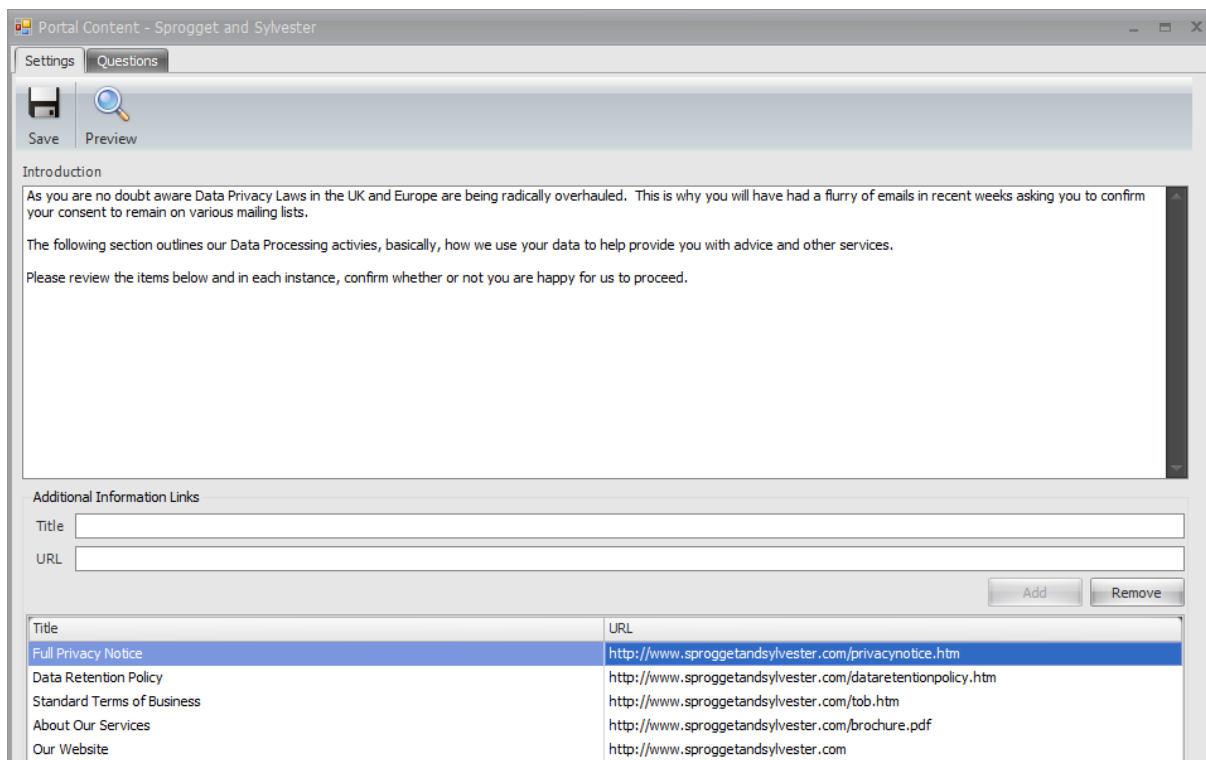


Figure 10-Additional Links

Once you are happy, click save and then you can check all is well by clicking the preview button.

You will see a new section has been added to the bottom of the privacy portal with your links displayed.

Additional Information	
For further details, please see the below links	
Title	URL
Our Website	http://www.sprogetandsylvester.com
About Our Services	http://www.sprogetandsylvester.com/brochure.pdf
Data Retention Policy	http://www.sprogetandsylvester.com/dataretentionpolicy.htm
Standard Terms of Business	http://www.sprogetandsylvester.com/tob.htm
Full Privacy Notice	http://www.sprogetandsylvester.com/privacynotice.htm

Figure 11-Additional Links – Preview

Now is a good time to check that all the links work and point to the correct document. Proceed to the next step once you are happy.

Configure email templates

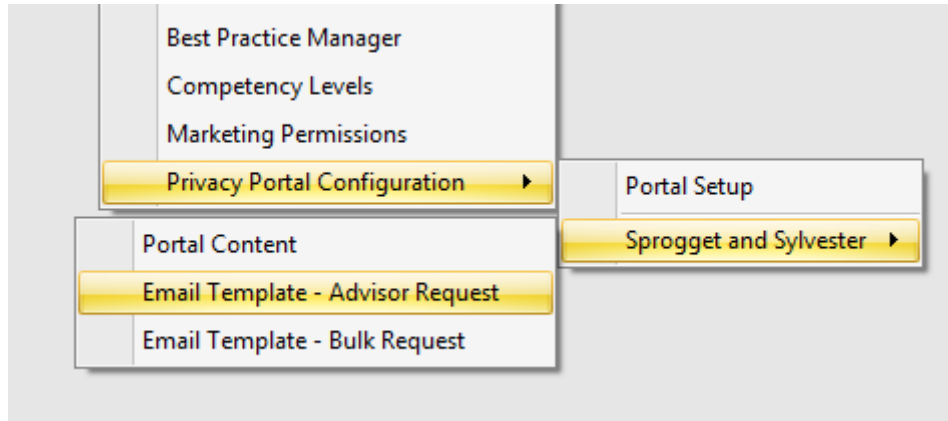


Figure 12-Email Template Menu

These two menu items allow you to configure your templates for sending the portal links to your client. The procedure for both single and bulk requests is identical, however bulk requests have a smaller number of merge fields available.

Single client requests

This template is used when email your clients on a singular basis from the case record. Click the menu item to launch the template editor.

To get you started you can copy and paste the following template. We fully expect that you will change the wording to suit your business and brand as well as adding any further information you deem necessary.

Additional merge fields are available from the right click menu.

@Portal.Logo

Dear @Client.FullName

As you may be aware there are a number of imminent amendments to UK and EU data protection regulation. The GDPR (General Data Protection Review) gives you more control over who has your data and what it is used for.

Therefore, we ask that you visit our privacy portal where we explain our data processes and ask you to state whether you are happy for us to continue doing this.

Our privacy portal can be found at @Portal.ClientUrl

Many Thanks

@System.LoggedOnUserName

Bulk Client Requests

This template is used when you email your clients, masse from the bulk consent request tool.

Repeat the previous procedure for the bulk template. In this example we are able to use exactly the same text in both templates. However, take care to make sure you don't use merge fields that are not available for the bulk template.

Set up path 2 – Simple multi brand setup

How to set up a Privacy Portal

Firstly, log into 360 Lifecycle – Office and go to the maintenance tab. From the compliance menu there is a new item named “Privacy Portal Configuration”. Clicking this will show another menu item name “Portal Setup”.

You will be presented with the screen shown in Figure 13.

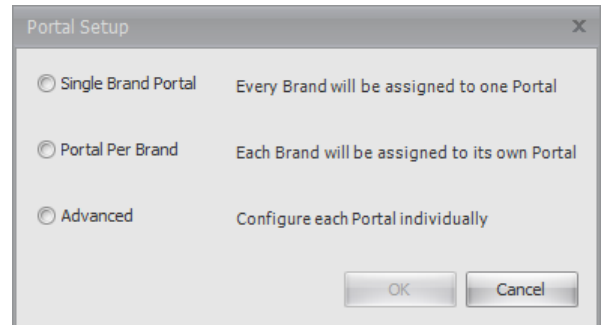


Figure 13- Portal Setup - Helper

Choose the option “Portal Per Brand” and click “OK”.

You will be presented with the following portal set up screen:

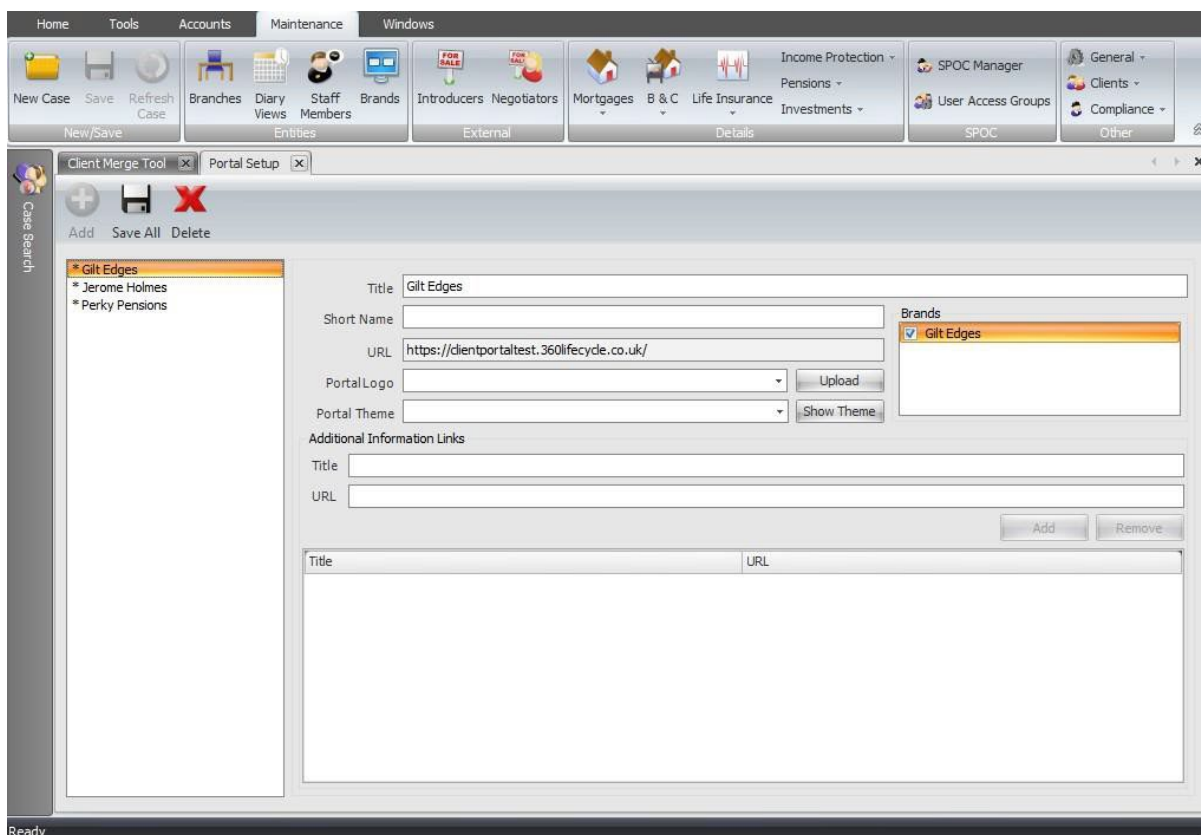


Figure 14- Portal Setup

Enter the title of your portal. Typically, this will be your company name.

Now choose a Short Name, this is a small piece of text that is included in the URL

of the portal. This allows the system to display the correct branding for your business. As it also forms part of the URL, your clients can have more confidence that they are going to the correct place. Next, choose a portal logo. This will normally be the same one you use to display on Reports. Should you need to upload a different Logo you can do so here.

Your portal comes preconfigured with a number default themes or styles. Choose a theme that most closely matches your brand image and one where your logo does not clash with the colour scheme. There is a preview button here so you can have some idea what each theme and colour scheme look like. Don't worry you can always come and change this later if you need to.

Your screen should now look something like this:

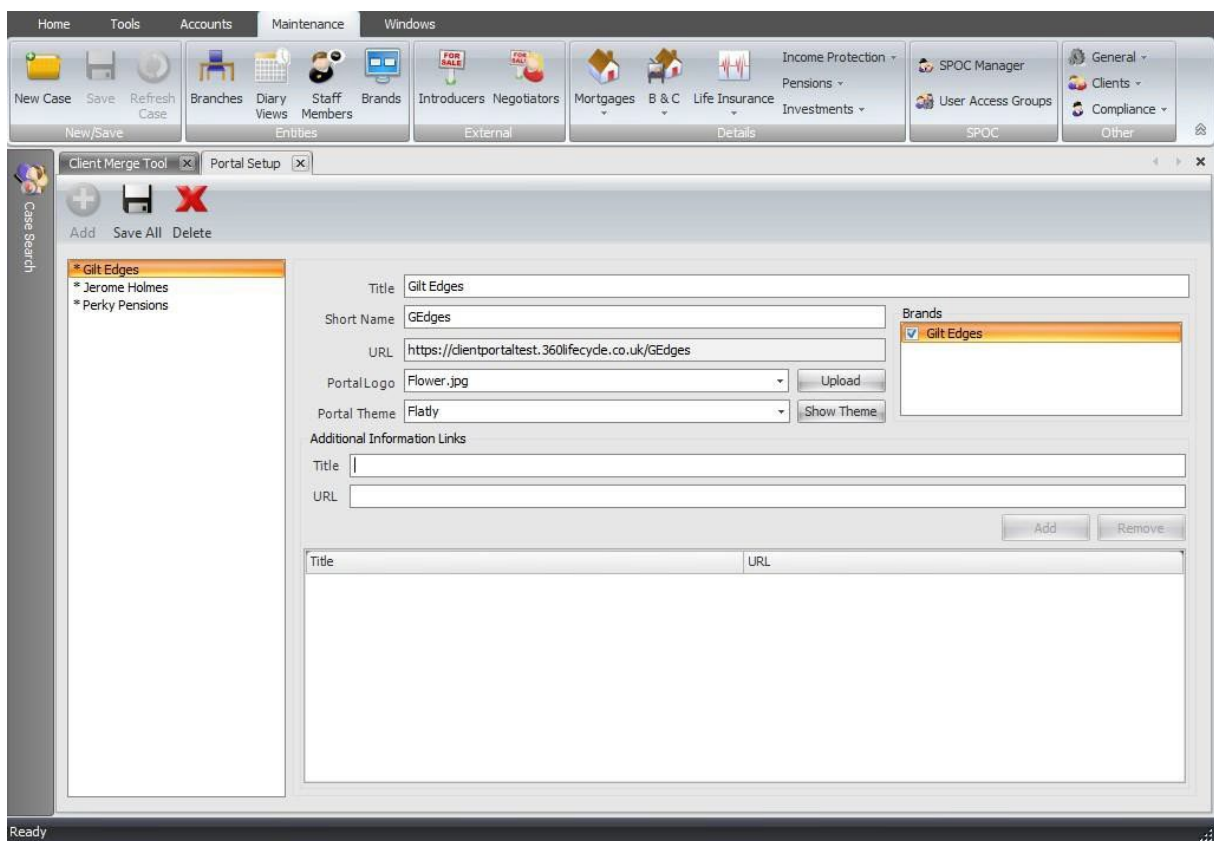


Figure 15-Portal Setup Complete

Hit the Save button and you are done. You can now close this screen.

Configure your consent questions

A new series of menu items will have now been added to the menu to allow you to further customise the portal you just configured. Click the “Portal Content” menu item.

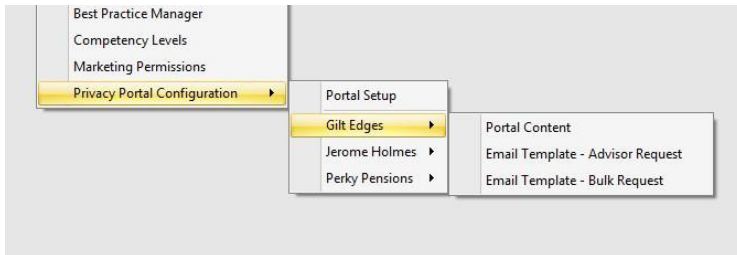


Figure 16- New Portal Menu

You will be presented with the following screen.

Go ahead and enter an introduction. Again, don't worry if you don't get this right first time, you can always come back and change it later.

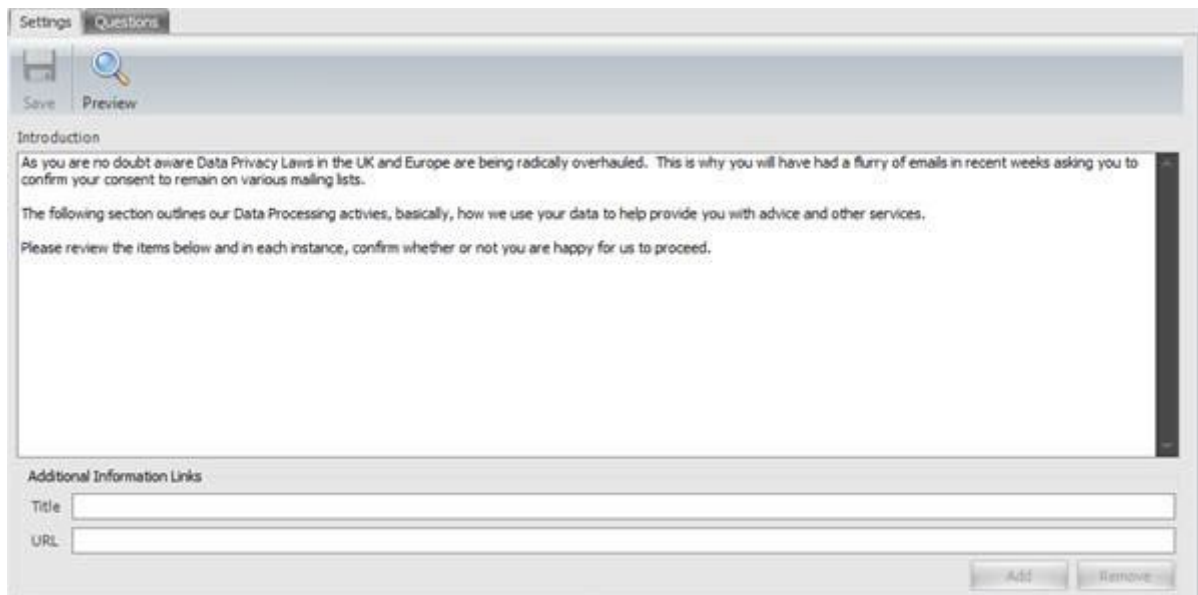


Figure 17- Enter Website Introduction

Now go to the second page titled “Questions” and click the Add button on the toolbar.

Go ahead and type in the details of the consent question you wish to ask of your clients and click save. At this point your screen should look something like this...

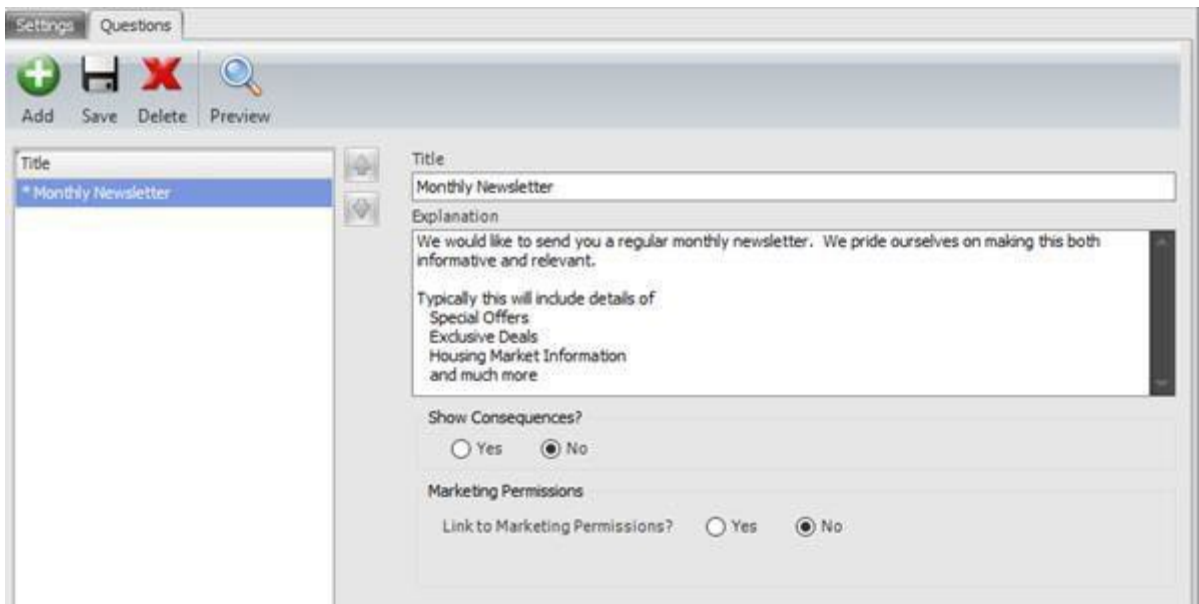


Figure 18-First Consent Question

At this point you can click the Save button to confirm your changes.

To see your new portal website for the first time, click the preview button. The system will launch your browser and show you a preview of your website exactly how your client will see it when they log in.

It should go without saying that this is example text only, it has not been checked for compliance and is only there to make it easier for us to explain the set-up process.

In our example the preview currently looks like this:

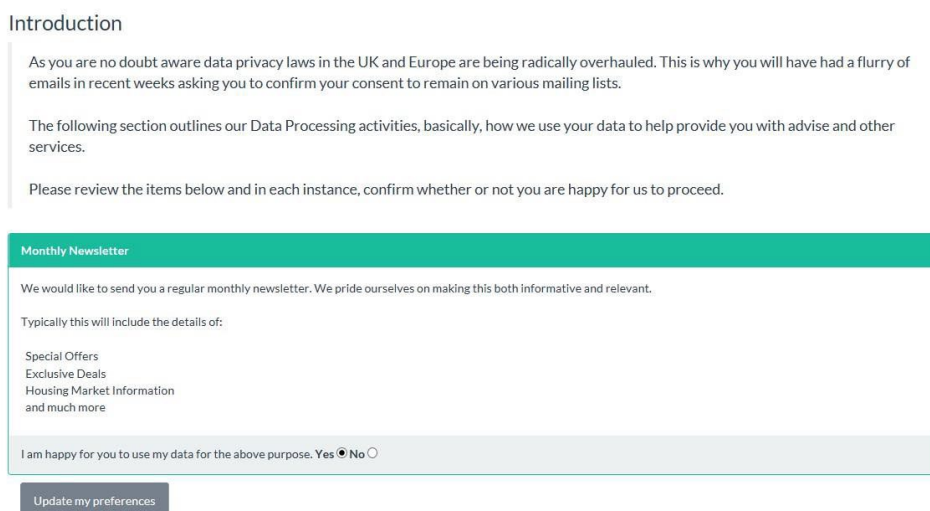


Figure 19- Website Preview

This is a good time to check a few things. It's better to check now than to find out it looks awful after you have invited thousands of clients to confirm their consent.

- Does the introductory paragraph look ok on the web page?
- Does your logo look ok or does it need resizing?
- Have you chosen a suitable theme?

If you spot anything on the page that needs tweaking then simply go back through these instructions and change anything that needs changing.

Should you wish to add further consent questions you can do this now. You can also choose to display an additional message that will be shown to your client if they refuse consent.

You can see how this looks in the configuration screen...

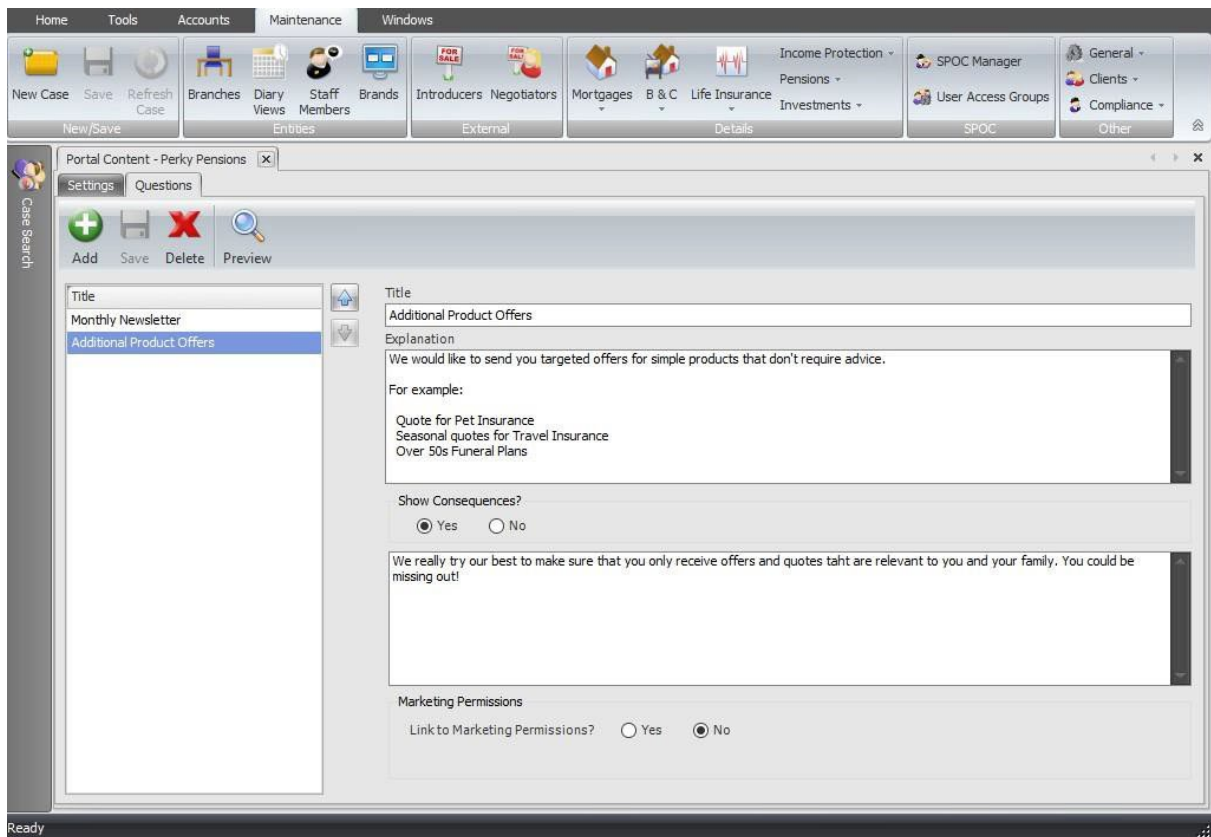


Figure 20-Additional Question & Consequences

Hitting the save button followed by the preview button will allow you to review your changes at any point. In the preview, this 2nd question now looks like this when you answer no to the consent question.

Additional Product Offers

We would like to send you targeted offers for simple products that don't require advice.

For example:

- Quote for Pet Insurance
- Seasonal quotes for Travel Insurance
- Over 50s Funeral Plans

I am happy for you to use my data for the above purpose. Yes No

We really try our best to make sure that you only receive offers and quotes that are relevant to you and your family. You could be missing out!

Figure 21-Consequences

Once you have set up all your consent questions you can move onto the next step.

Add Links to Additional Documents

If you wish to add additional documents to the privacy portal, you can do this here, otherwise move onto the next step.

Examples of document links you may wish to add:

- Privacy Notice
- Data Retention Policy
- Standard Terms of Business
- Company Brochure
- Link to your Website

In turn enter a title for each document and a URL pointing to the location then click the add button.

After adding all your links to relevant documents your portal setup screen should look something like this:

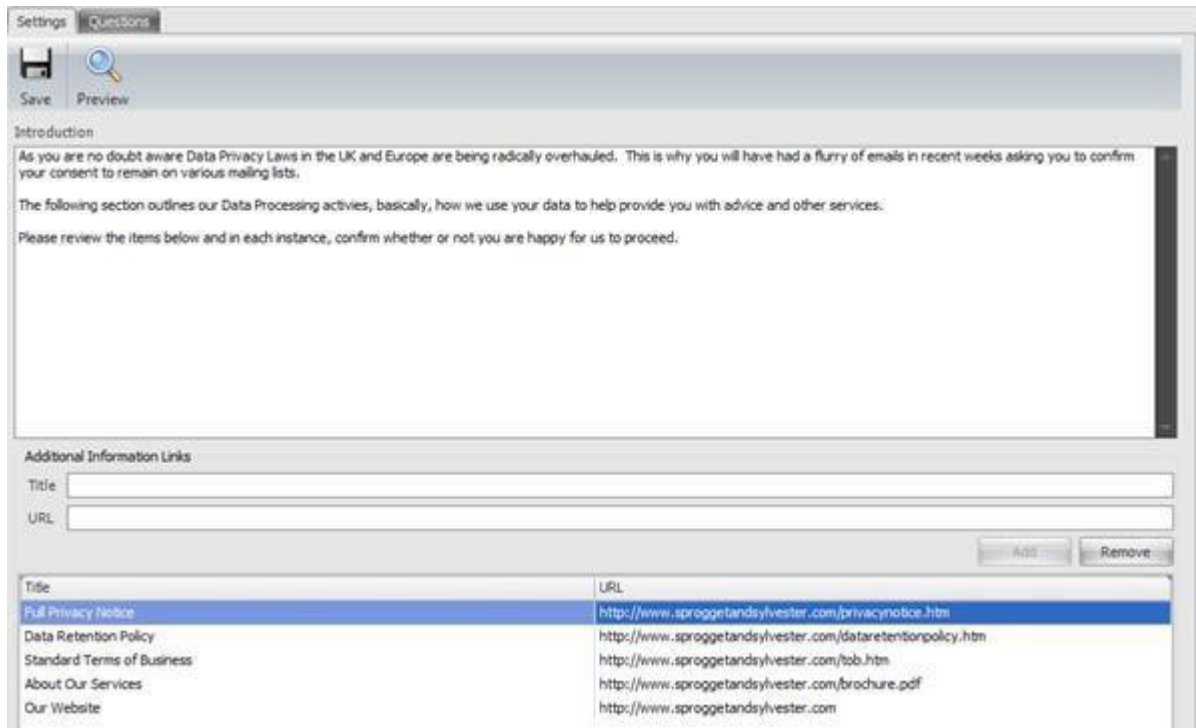


Figure 22-Additional Links

Once you are happy, click save and then you can check all is well by clicking the preview button.

You will see a new section has been added to the bottom of the privacy portal with your links displayed.

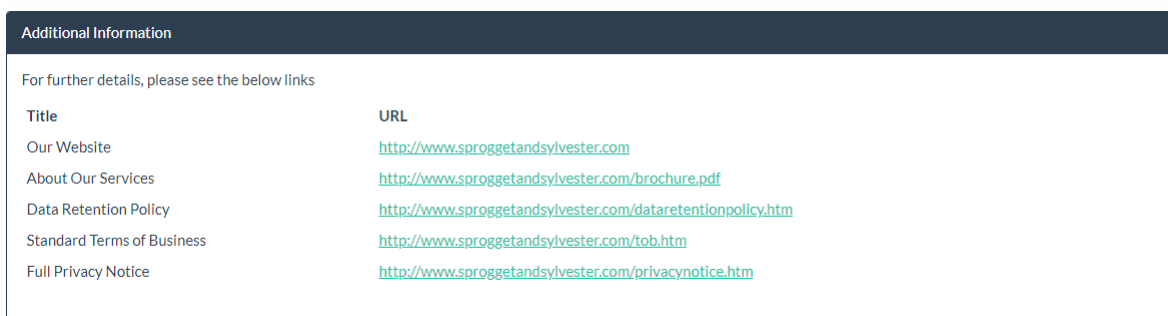


Figure 23-Additional Links – Preview

Now is a good time to check that all the links work and point to the correct document. Proceed to the next step once you are happy.

Configure email templates

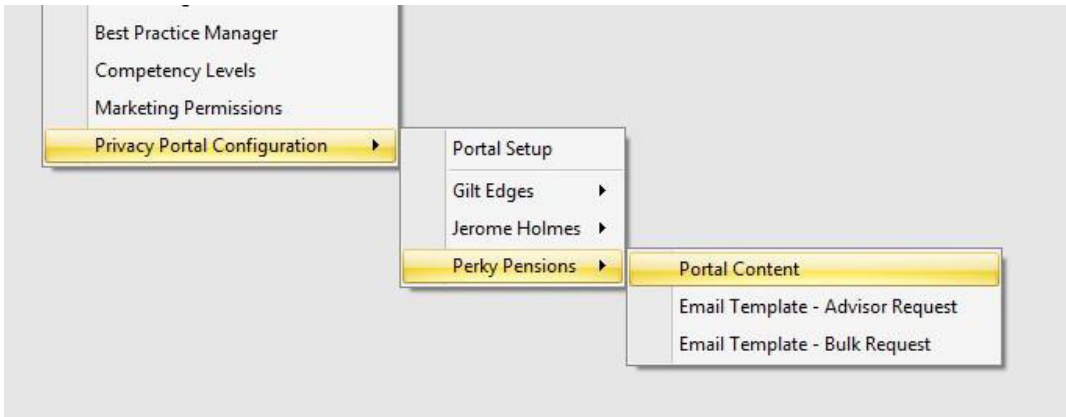


Figure 24-Email Template Menu

These two menu items allow you to configure your templates for sending the portal links to your client. The procedure for both single and bulk requests is identical, however bulk requests have a smaller number of merge fields available.

Single client requests

This template is used when email your clients on a singular basis from the case record. Click the menu item to launch the template editor.

To get you started you can copy and paste the following template. We fully expect that you will change the wording to suit your business and brand as well as adding any further information you deem necessary.

Additional merge fields are available from the right click menu.

@Portal.Logo

Dear @Client.FullName

As you may be aware there are a number of imminent amendments to UK and EU data protection regulation. The GDPR (General Data Protection Review) gives you more control over who has your data and what it is used for.

Therefore, we ask that you visit our privacy portal where we explain our data processes and ask you to state whether you are happy for us to continue doing this.

Our privacy portal can be found at @Portal.ClientUrl

Many Thanks

@System.LoggedOnUserName

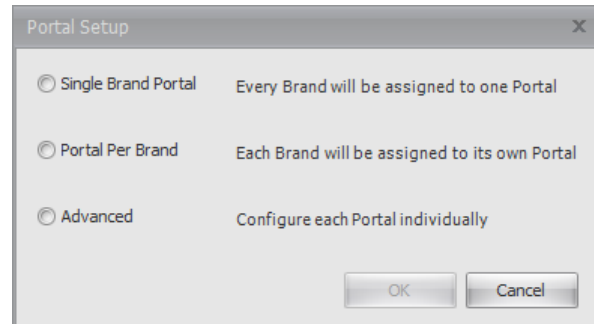
Bulk Client Requests

This template is used when email your clients en masse from the bulk consent request tool. Repeat the previous procedure for the bulk template. In this example we are able to use exactly the same text in both templates. However, take care to make sure you don't use merge fields that are not available for the bulk template.

Setup Path 3 – Advanced setup procedure

How to set up a privacy portal

Firstly, log into 360 Lifecycle – Office and go to the maintenance tab. From the compliance menu there is a new item named “Privacy Portal Configuration”. Clicking this will show another menu item name “Portal Setup”.



You will be presented with the screen shown in Figure 25.

Choose the option “Advanced” and click “OK”.

Figure 25- Portal Setup

You will be presented with the following portal set up screen:

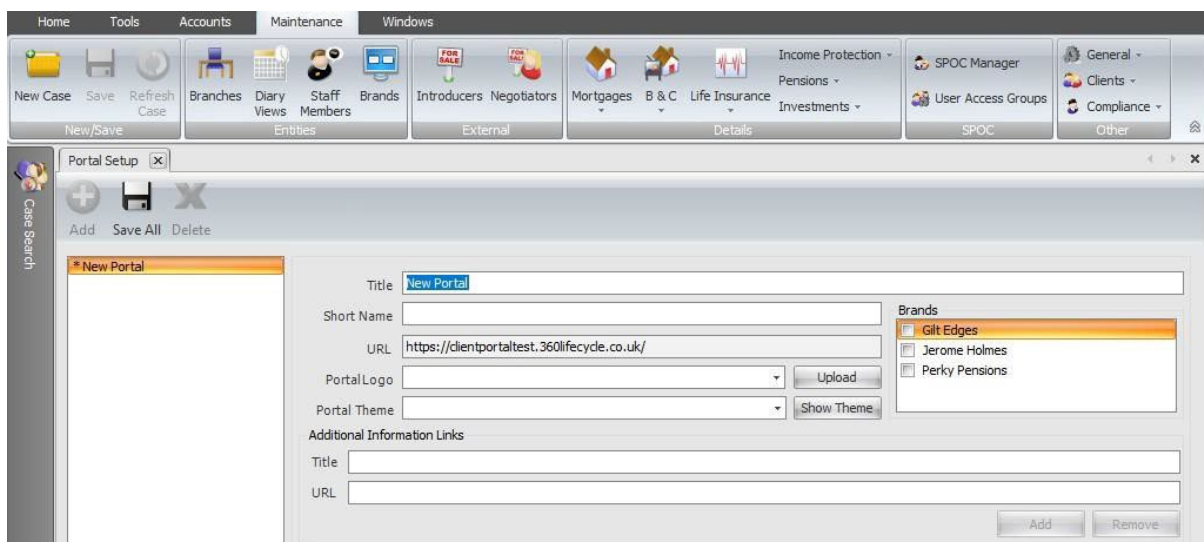


Figure 26 – Portal Set up

Enter the details required for the portal:

Enter the title of your portal. Typically, this will be your company name. Now choose a Short Name, this is a small piece of text that is included in the URL of the portal. This allows the system to display the correct branding for your business. As it also forms part of the URL, your clients can have more confidence that they are going to the correct place. Next, choose a portal logo. This will normally be the same one you use to display on Reports. Should you need to upload a different logo you can

do so here.

Your portal comes preconfigured with a number default themes or styles. Choose a theme that most closely matches your brand image and one where your logo does not clash with the colour scheme. There is a preview button here so you can have some idea what each theme and colour scheme look like. Don't worry you can always come and change this later if you need to.

Select one or more brands that will use this portal. Your screen should now look something like this:

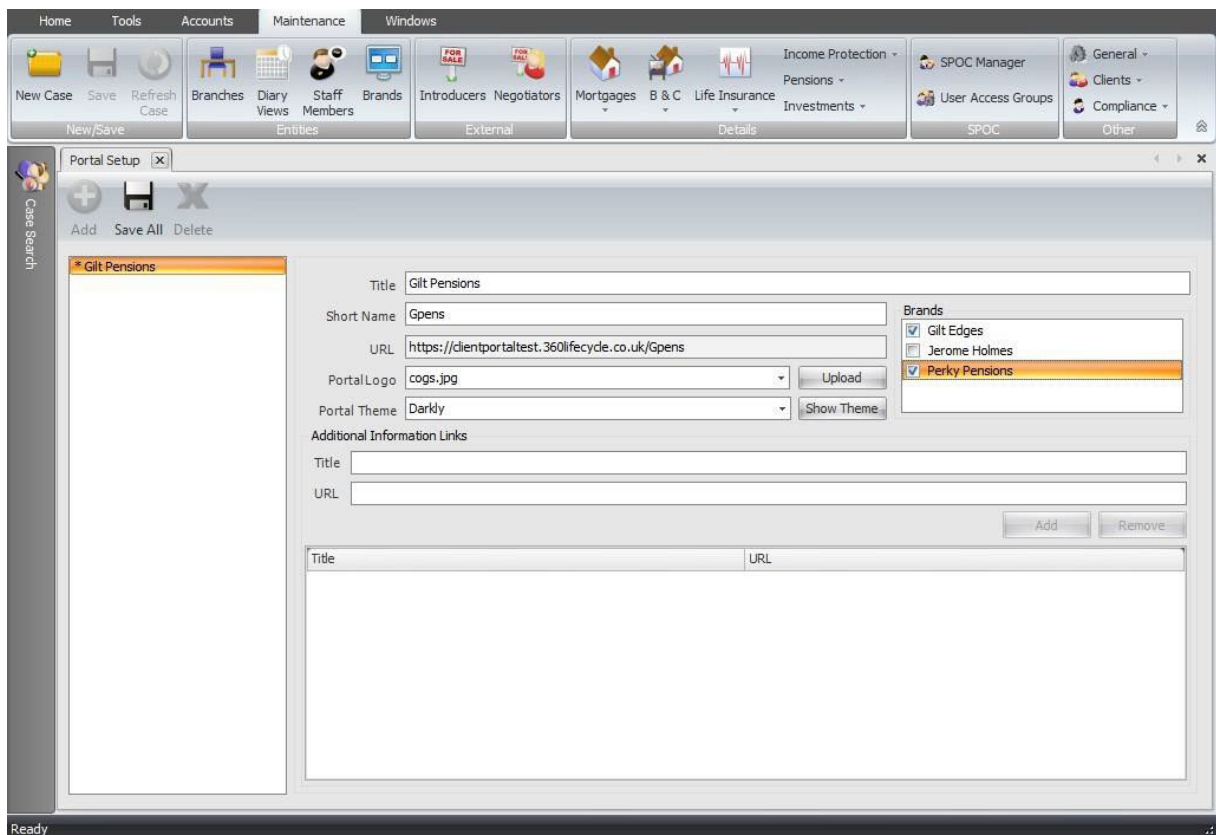


Figure 27-Portal Setup Complete

Hit the Save button and you are done. You can now add other portals (if you have any unassigned brands) or close this screen.

Configure your consent questions

A new series of menu items will have now been added to the menu to allow you to further customise the portal you just configured. Click the “Portal Content” menu item.

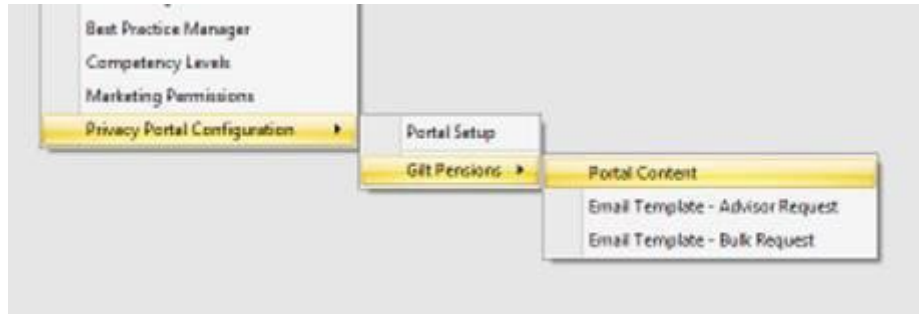


Figure 28- New Portal Menu

You will be presented with the following screen. Go ahead and enter an introduction. Again, don't worry if you don't get this right first time, you can always come back and change it later.

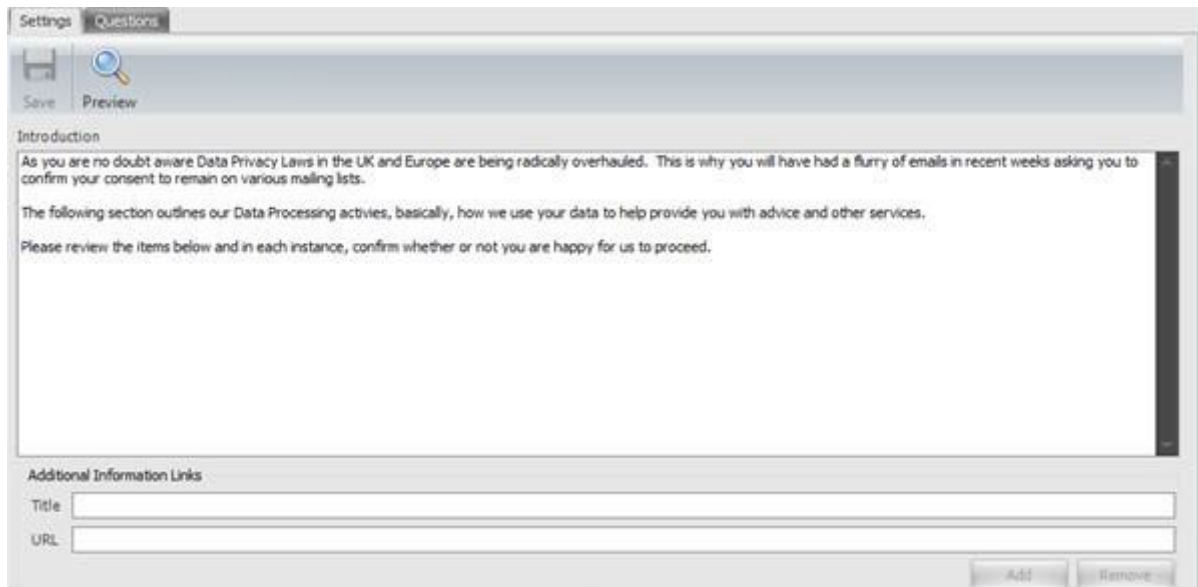


Figure 29- Enter Website Introduction

Now go to the second page titled “Questions” and click the Add button on the toolbar.

Go ahead and type in the details of the consent question you wish to ask of your clients and click save. At this point your screen should look something like this...

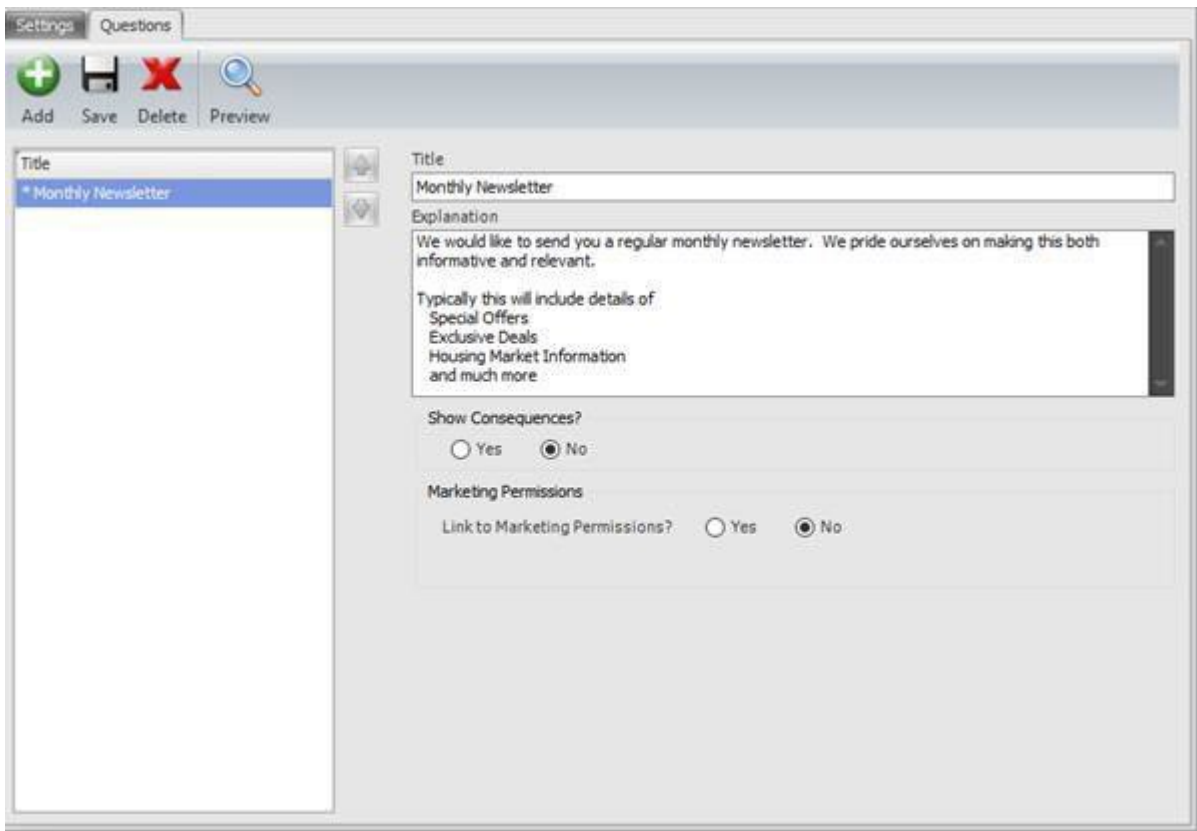


Figure 30-First Consent Question

At this point you can click the Save button to confirm your changes.

To see your new portal website for the first time, click the preview button. The system will launch your browser and show you a preview of your website exactly how your client will see it when they log in.

It should go without saying that this is example text only, it has not been checked for compliance and is only there to make it easier for us to explain the set-up process.

In our example the preview currently looks like this:

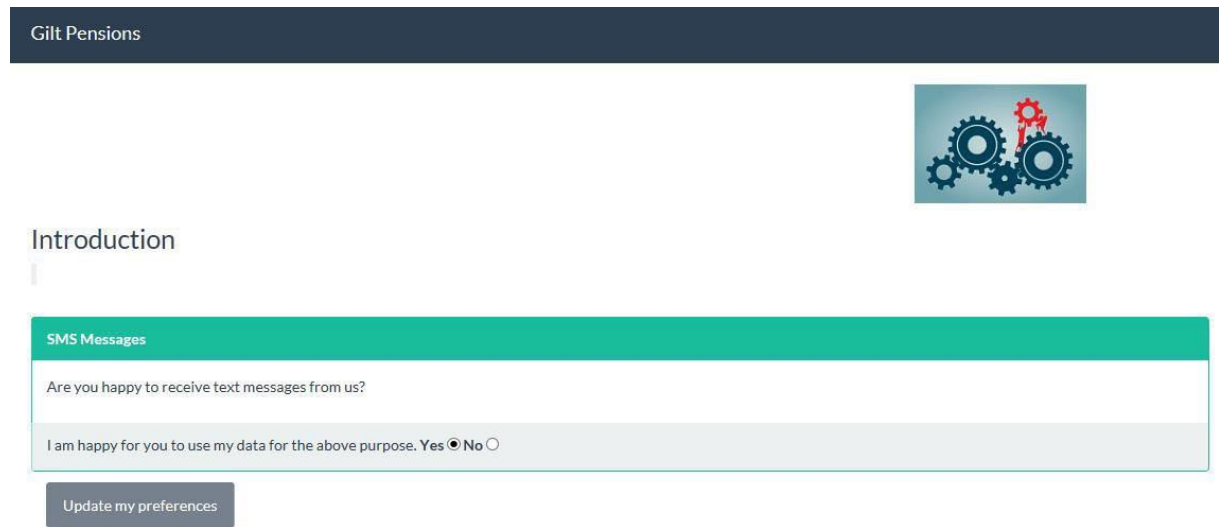


Figure 31- Website Preview

This is a good time to check a few things. It's better to check now than to find out it looks awful after you have invited thousands of clients to confirm their consent.

- Does the introductory paragraph look ok on the web page?
- Does your logo look ok or does it need resizing?
- Have you chosen a suitable theme?

If you spot anything on the page that needs tweaking then simply go back through these instructions and change anything that needs changing.

Should you wish to add further consent questions you can do this now. You can also choose to display an additional message that will be shown to your client if they refuse consent.

You can see how this looks in the configuration screen below:

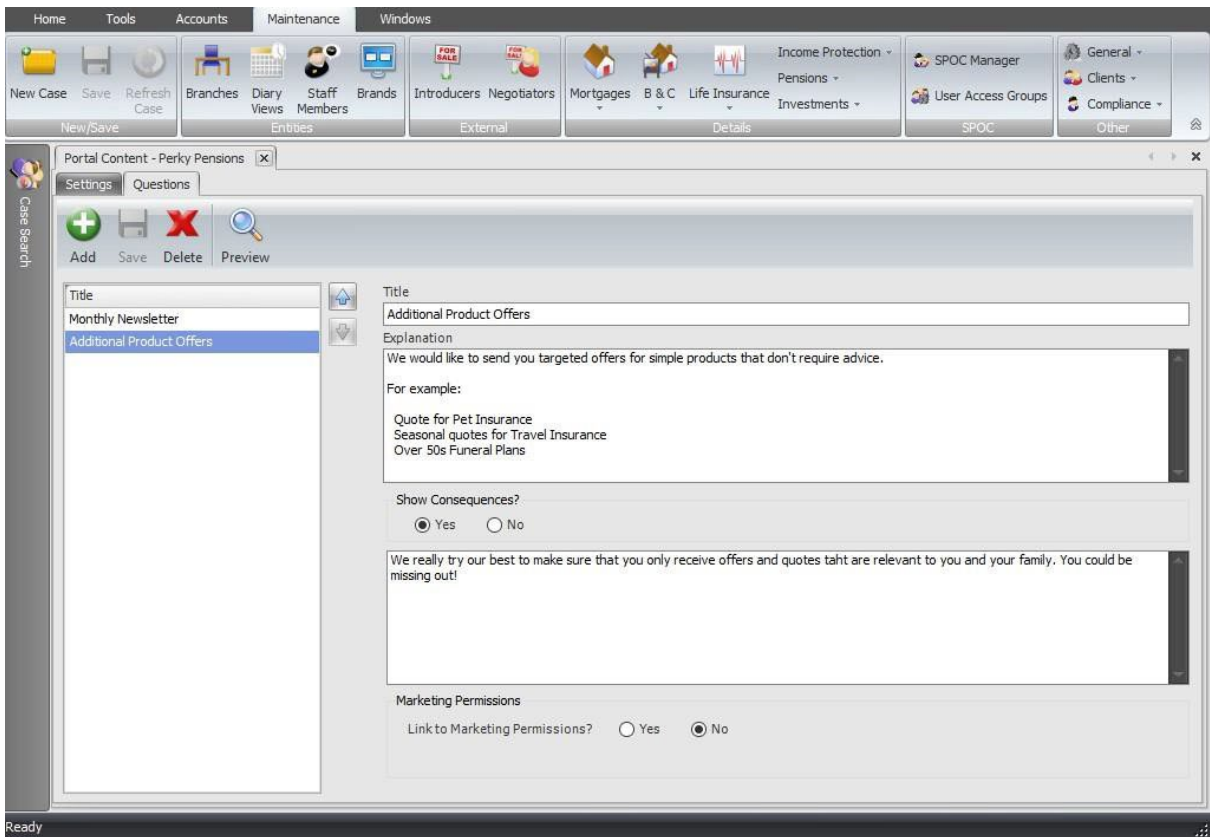


Figure 32-Additional Question & Consequences

Hitting the save button followed by the preview button will allow you to review your changes at any point. In the preview, this 2nd question now looks like this when you answer no to the consent question.

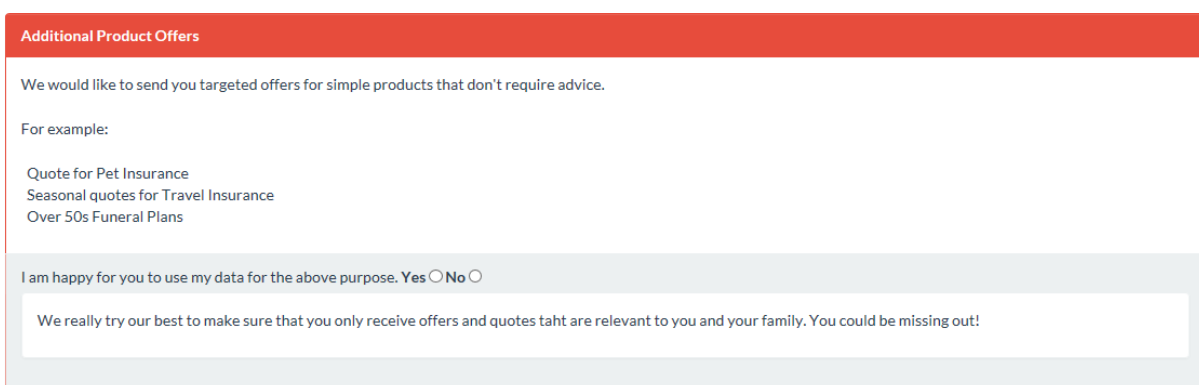


Figure 33-Consequences

Once you have set up all your consent questions you can move onto the next step.

Add Links to Additional Documents

If you wish to add additional documents to the privacy portal, you can do this here otherwise move onto the next step.

Examples of document links you may wish to add:

- Privacy Notice
- Data Retention Policy
- Standard Terms of Business
- Company Brochure
- Link to your Website

In turn enter a title for each document and a URL pointing to the location then click the add button. After adding all your links to relevant documents your portal setup screen should look something like this:

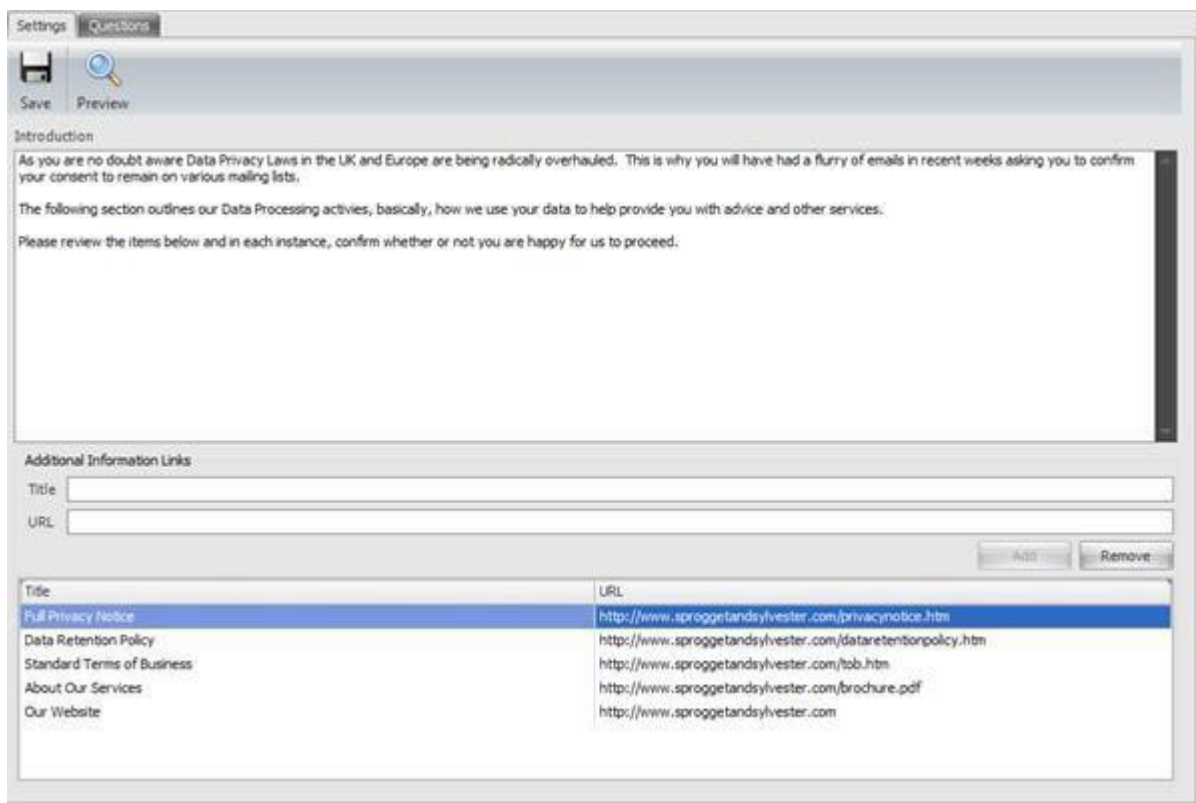


Figure 34-Additional Links

Once you are happy, click save and then you can check all is well by clicking the preview button. You will see a new section has been added to the bottom of the privacy portal with your links displayed.

Additional Information	
For further details, please see the below links	
Title	URL
Our Website	http://www.sprogetandsylvester.com
About Our Services	http://www.sprogetandsylvester.com/brochure.pdf
Data Retention Policy	http://www.sprogetandsylvester.com/dataretentionpolicy.htm
Standard Terms of Business	http://www.sprogetandsylvester.com/tob.htm
Full Privacy Notice	http://www.sprogetandsylvester.com/privacynotice.htm

Figure 35-Additional Links – Preview

Now is a good time to check that all the links work and point to the correct document. Proceed to the next step once you are happy.

Configure email templates

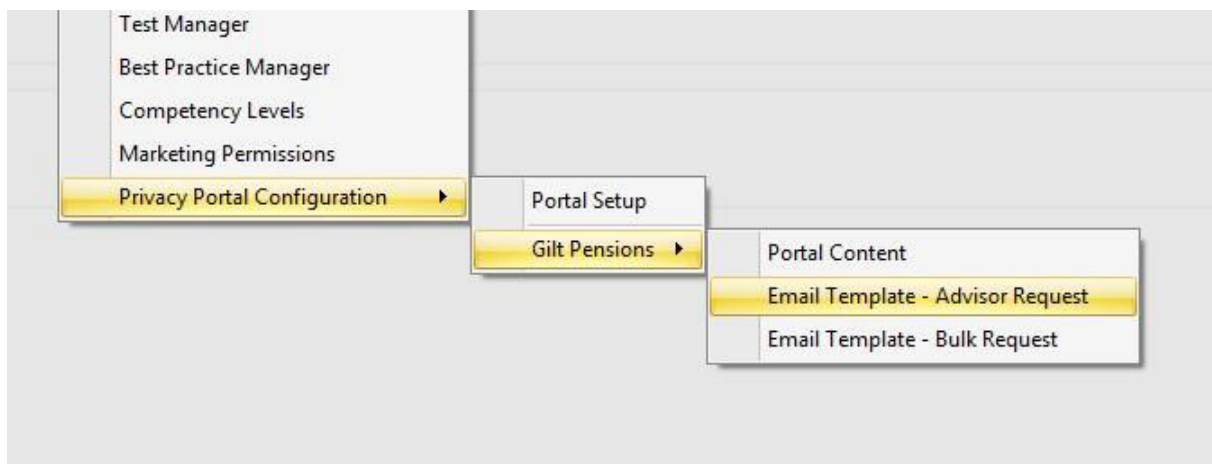


Figure 36-Email Template Menu

These two menu items allow you to configure your templates for sending the portal links to your client. The procedure for both single and bulk requests is identical, however bulk requests have a smaller number of merge fields available.

Single client requests

This template is used when email your clients on a singular basis from the case record. Click the menu item to launch the template editor.

To get you started you can copy and paste the following template. We fully expect that you will change the wording to suit your business and brand as well as adding any further information you deem necessary.

Additional merge fields are available from the right click menu.

@Portal.Logo

Dear @Client.FullName

As you may be aware there are a number of imminent amendments to UK and EU data protection regulation. The GDPR (General Data Protection Review) gives you more control over who has your data and what it is used for.

Therefore, we ask that you visit our privacy portal where we explain our data processes and ask you to state whether you are happy for us to continue doing this.

Our privacy portal can be found at @Portal.ClientUrl

Many Thanks

@System.LoggedOnUserName

Bulk Client Requests

This template is used when email your clients en masse from the bulk consent request tool. Repeat the previous procedure for the bulk template. In this example we are able to use exactly the same text in both templates. However, take care to make sure you don't use merge fields that are not available for the bulk template.

Client Merge Tool

Deduplicating clients

In 360 Office – Tools, there is a “Client Merge Tool”. This feature can be used to ensure that “Privacy” portals are not sent to the same client more than once if they are on multiple case records.

By clicking on this, you should see a similar screen to the one demonstrated below:

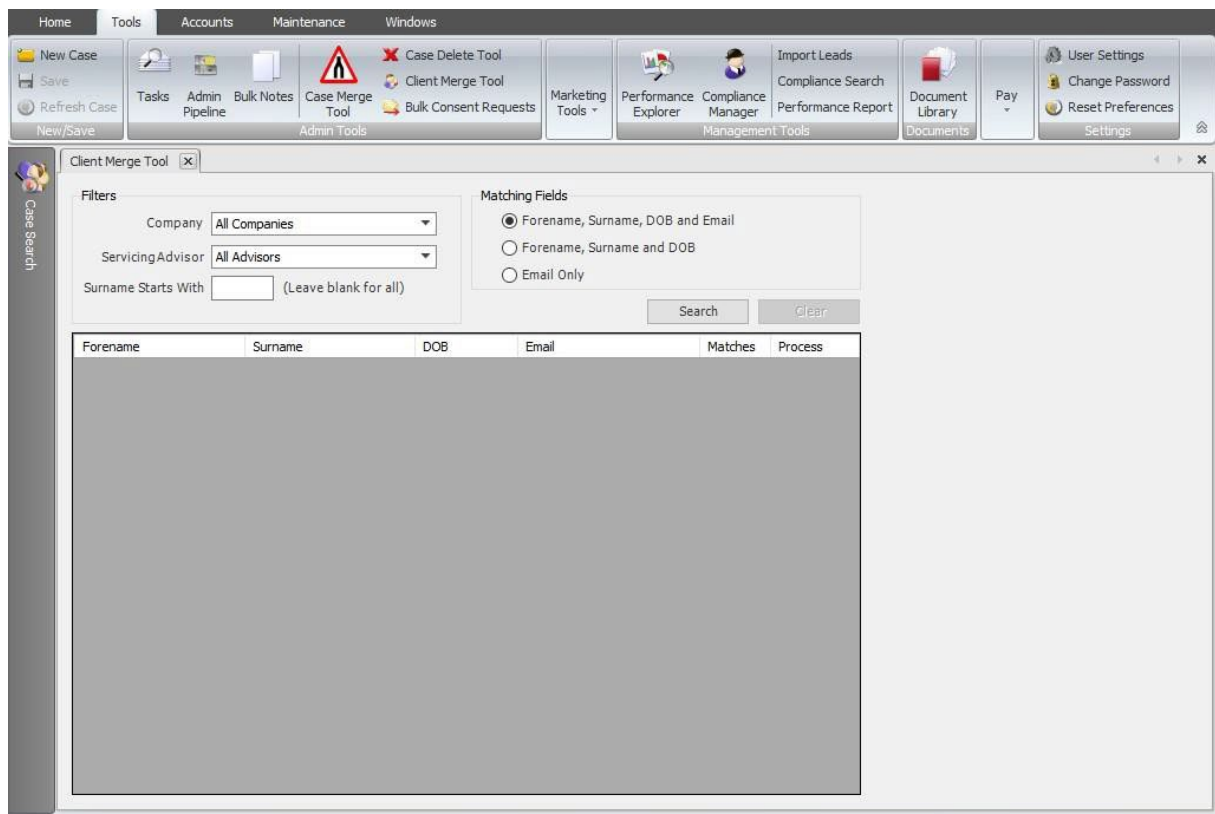


Figure 37-Client Merge

Here, potential ‘Matching Fields’ can be selected such as cases with clients who have the same ‘Forename, Surname, DOB and Email Address’, along with some filtering options which can be used to narrow-down clients for a particular “Company”, “Servicing advisor” and “Surname.” Once these options have been applied, click the “search” button, and this will feature a list of clients with matching case records, similar to Figure 38.

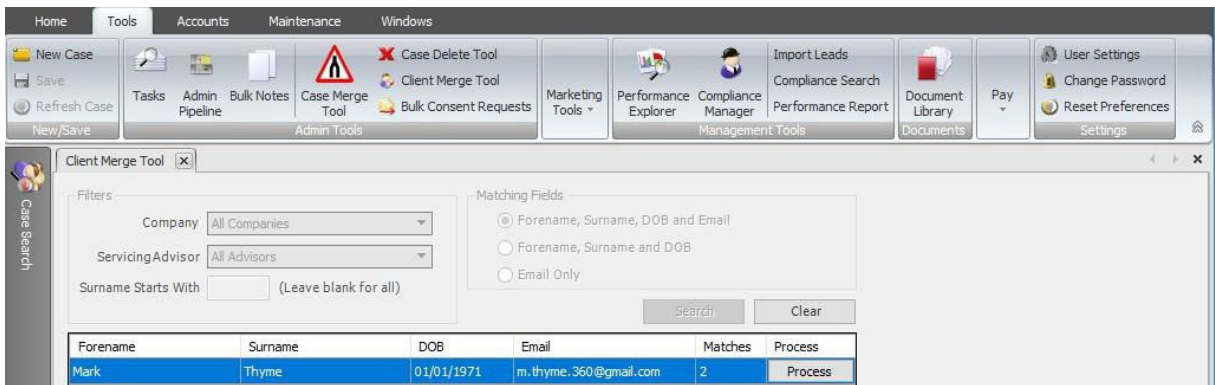


Figure 38- Matching clients

Now, if you click the “Process” button, this will bring up the Deduplication Wizard:

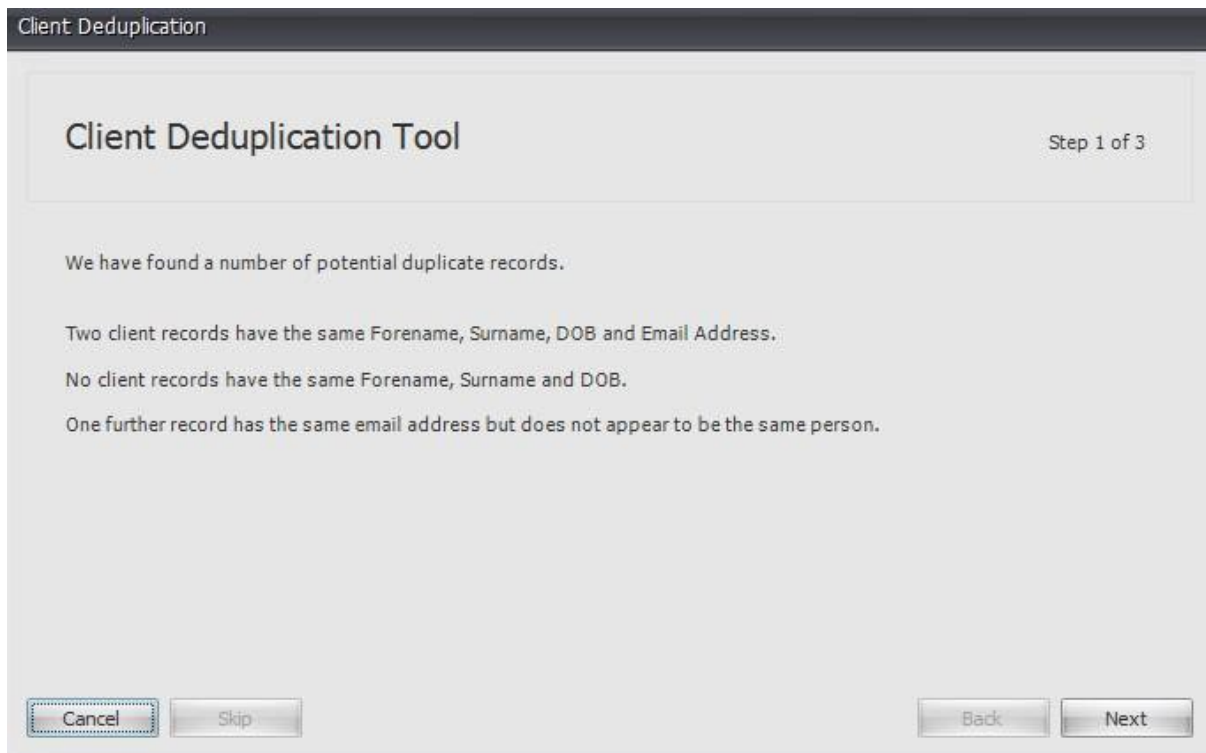


Figure 39- Deduplication Wizard

Press “Next” and now is the option to select which records you would like to “Merge” and which record you want to “Keep” the details of.

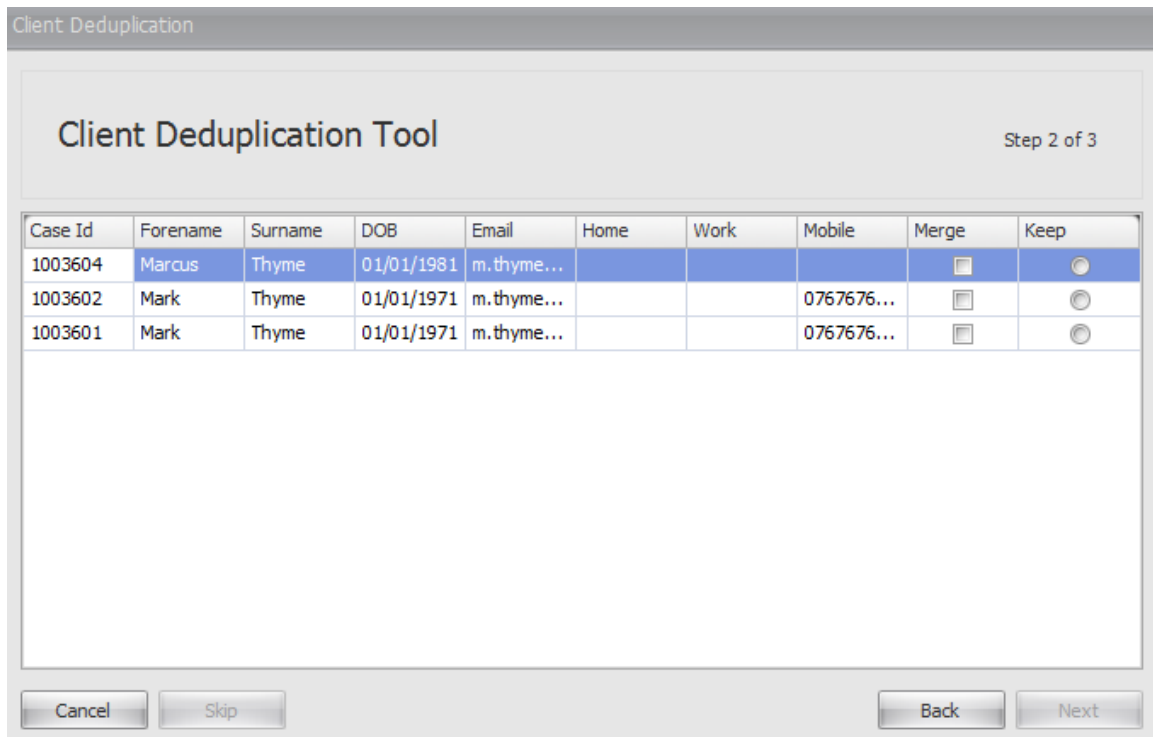


Figure 40- Keep / Merge details

Once the details have been selected, the ‘Dedupe’ option will now be available.

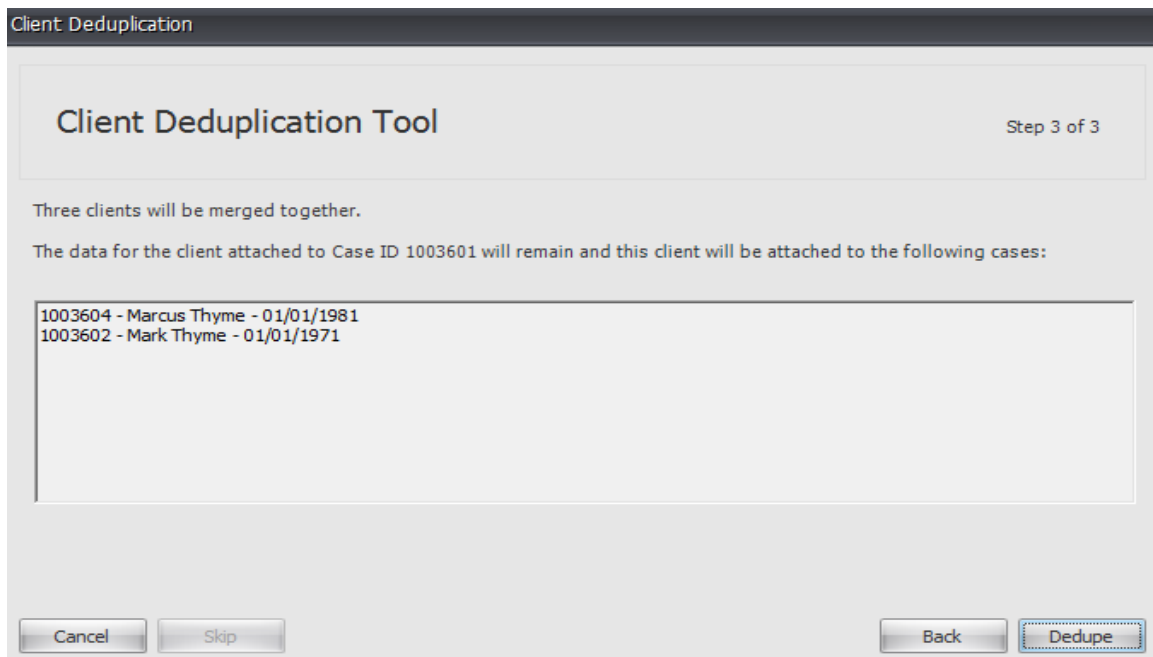
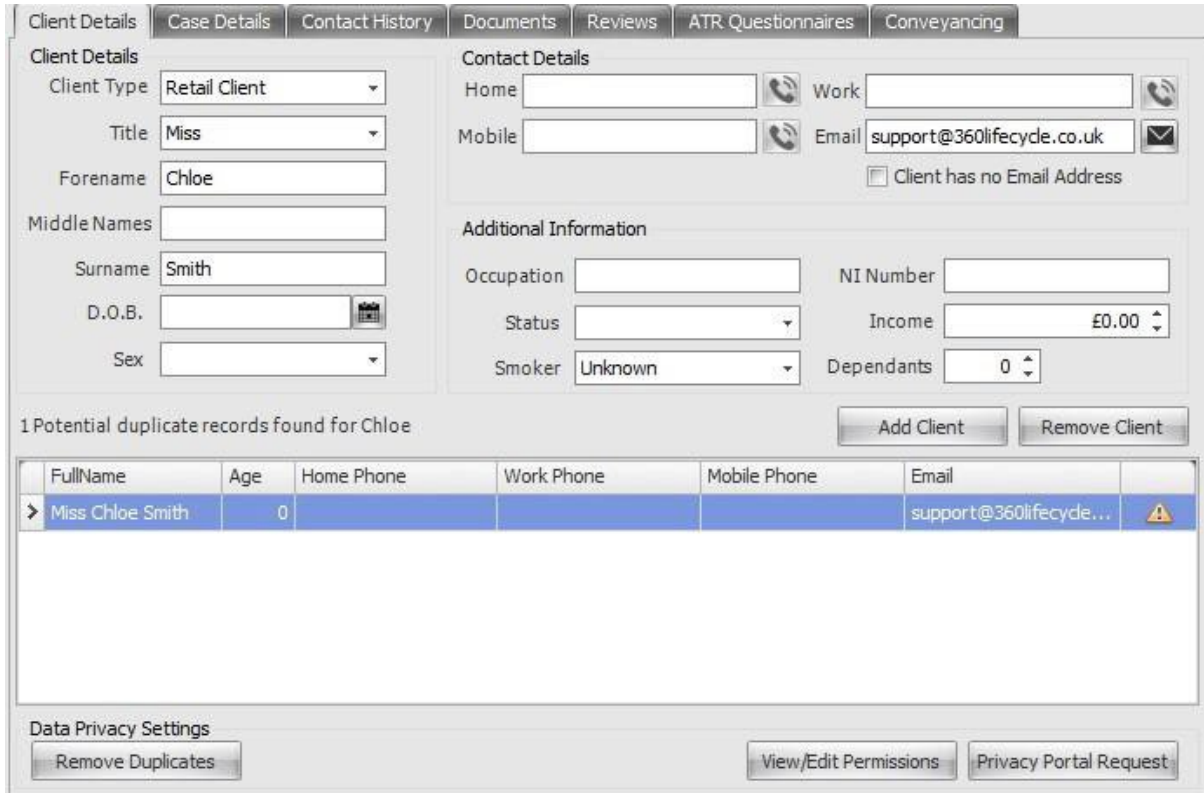



Figure 41- Dedupe Confirmation

When opening a case record, you can easily confirm whether this client is duplicated elsewhere across the system; this can be identified by the warning sign next to the email address at the bottom of the Client Details tab. On this tab, you can also deduplicate on a case by case basis selecting “Remove Duplicates” as shown below:



The screenshot shows the 'Client Details' tab in the 360 lifecycle system. The client's name is Chloe Smith, a Retail Client. A warning message states: '1 Potential duplicate records found for Chloe'. A table below lists the duplicate record with a warning icon next to the email address.

FullName	Age	Home Phone	Work Phone	Mobile Phone	Email
Miss Chloe Smith	0				support@360lifecyde... 

At the bottom of the form, there are buttons for 'Remove Duplicates', 'View/Edit Permissions', and 'Privacy Portal Request'.

Figure 42- Case Record Deduplication

Marketing

Under the Compliance tab in Maintenance, 'Marketing Permissions' can be set, which will add the defined permission into Campaign Manager. If you choose to select "Auto-add as filter in Campaign Manager", the permission will automatically be added to the Query Builder section in Campaign Manager each time you open the module.

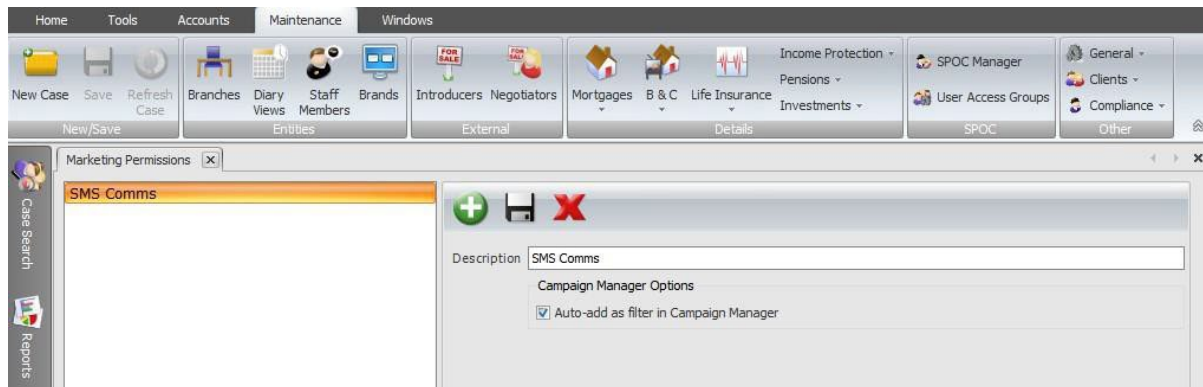


Figure 43- Marketing Permissions

When defining 'Questions' in the content section during the portal setup, responses can be traced in Campaign Manager if the 'link to Marketing Permissions?' section has been selected as 'Yes' as show below. Marketing Permissions will be applied provided the client answers 'Yes' to the relevant question:

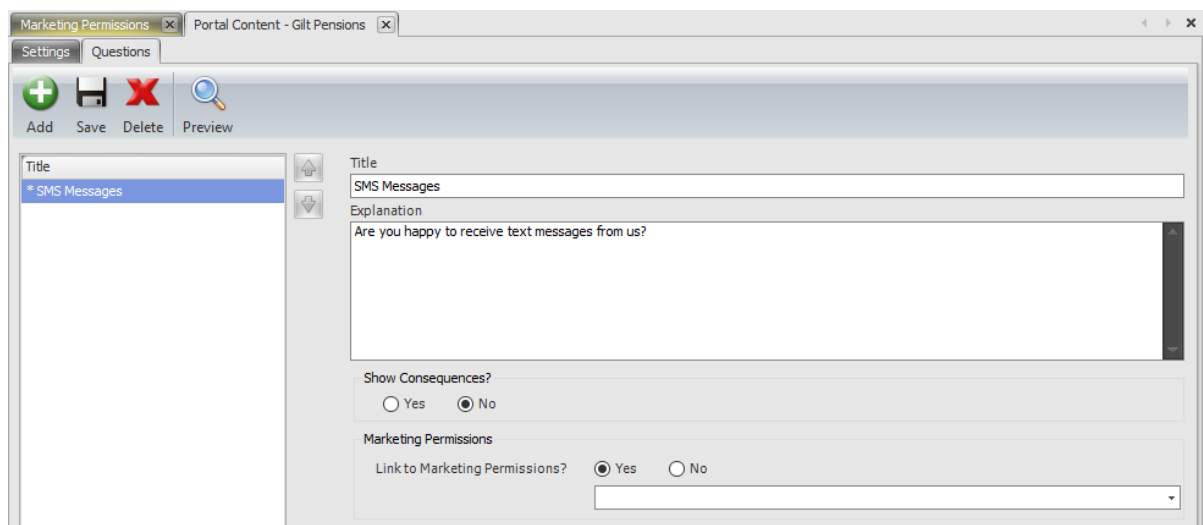


Figure 44- Marketing Permission