

# **User Documentation**

# GDPR - Privacy Statements and Data Protection

Functionality for Autoline Revision 8, Versions 9304E-31 and above

Date:

May 2018



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# **1** General Information

A new solution (X4DPA) has developed for Autoline Revision 8, version 9304E-31 and above to allow dealers to create and maintain Data Protection Agreements (DPA) with their customers, i.e. to record what the customer has agreed or not agreed to.

The product has been designed to be flexible enough for dealers to create a setup that is capable of managing their data protection requirements. However, it is the dealer's responsibility to determine what these data protection requirements and responsibilities are.

This document provide details on the GDPR-related developments undertaken



# 2 Modules involved

The Privacy Statements and Data Protection enhancements impact the following modules.

Module		Description
MS	X4	CRM Add-ons
MK	CRM	Customer relationship management
SO	POS	Point of sale
SR	Showroom	Showroom
VS	VSB	Vehicle stock book
SL	SL	Sales Ledger
СМ	СМ	Contact Management



# **3** Parameters and set-up

The Privacy Statements and Data Protection enhancement requires the configuration of specific parameters. These parameters can be found in:

- Manufacturing Systems
- X4 CRM Add-ons menu
- Generic CRM parameters

NOTE: This requires priority 7 or above to MS company X4

There is a new Data protection parameters branch within the CRM parameter configuration utility in the X4 company of MS. Here, users are able to define the required parameters, as well as setup methods, channels and Data Protection Statements (DPS) at a CRM company level, and channel statuses on an Autoline system level.

# 3.1 Defining general parameters

With the general parameters, the Privacy Statements and Data Protection functionality can be switched on.

CRM add-ons parameter configuration utility - CRM add-ons (kcca/982)		
<u>F</u> ile <u>E</u> dit <u>T</u> ools <u>H</u> elp		
Eile       Edit       Iools       Help         Image: State of the state of t	Data protection parameters - Company: MK/BT         General Methods [Channels] Statements]         General parameters to activate DPA         Activate agreements on gustomers:         Activate agreements on companies:         Activate agreements on companies:         Activate agreements:         Include cases without an agreements:         Include cases without an agreements:         Activate audit (og on agreements:         Qays to indicate the expiry date:         Show channels on agreement grid:	aly v
		Release: 2.54

NOTE: To create a statement, you first need to create channels and methods

**Data Protection Parameters** 



#### Parameters and their meanings

- Activate statements on customers makes the Data protection tab available on Customer records.
- Activate statements on companies makes the Data protection tab available on Company records.

**NOTE:** One of these two parameters has to be ticked. Otherwise, the Privacy Statements and Data Protection functionality will not be present on Autoline.

- Activate location based statements allows Data Protection Agreements (DPAs) to be created for a specific location for a particular CRM company. Normally, this will be deactivated and only one DPA per brand, per CRM company, will be possible. The default value of this parameter is no (un-ticked).
- Include cases without an agreement? allows the inclusion of customers or companies without a valid data protection agreement into marketing activities. The default value of this parameter is No (un-ticked).
- Activate auditing on agreements turns on the Autoline file auditing for the data protection agreement files ms.X4.dpagr and ms.X4.dpago.

*Note:* Please don't forget to configure necessary entries in the auditing database in:

- System utilities
- Management menu
- Database auditing
- > Audit control
- > Select the Module to be audited eg MK CRM
- Select the Company
- Select the table eg targt [Customer records]
- Create
- Select the columns you require from the list on the left eg Title, firstname, surname, TPS flags, don't send any mail etc
- > Add
- Save



💼 Database au	udit control - Support Syste	m Re	ev 8.30 (kcc/1018)				-		×
Module: Company:	MK [CRM]	t Con	 npany 11 ]			N.B. Items in [bracket have database audit o records on file	s] :ontrol		
Table:	targt	[Cu	stomer records ]		-				
Available column	ns to add from dictionary:			Column list to be	e audited	:		Clea	ar ort
Short name	Description	$\square$		Short name	Desc	ription	1		
MAGIC	Customer number	~		INITIALS	Initia	ls	·		
COMMAGIC	Company magic number			FIRSTNAM	First	name			
STATUS	Record status		Add	SURNAME	Sum	ame			
CREATED	Date created			ADDRESS	Addr	ess			
EDITED	Date last edited		►	EMAIL	E-ma	il address		0	. 1
TITLE	Title			NOMAIL	Dont	send any mail		Urea	te
SALUTE	Salutation			TPSON	TPS	protected?		0	1
SHORT	Short name			,				Sav	e
EXEC	Contact executive		Remove					0	. 1
PHONE	Telephone numbers							Cano	el
POSTCODE	Postcode		•						
TARGTYPE	Customer type		44						
LETTERS	Auto letters		•						1
COSTCENT	Department							Help	D
ACCOUNT	Sales ledger account							<b>F</b>	. 1
COMPPOS	Company position	$\checkmark$						Ext	t
Report on all audit	t controls								

**Please note**: you are free to audit any fields you choose on the customer record but it is not recommended to audit all available fields or any more fields than required as this will have a system performance impacts

- Activate audit log on agreements adds an option to view an audit of the channel agreements from within the data protection tab in CRM. Each time a channel status is changed an entry is written to the ms.X4.dpaau file.
- Days to indicate the expiry date Enter the number of days to invoke a message to the user before the validity date of the data protection agreement will be reached
- Show channels in agreement grid Define the display mode of the communication channels in the agreement grid on the data protection tab - 'H'orizontally or 'V'ertically. See also paragraph <u>Agreements</u>



#### Selecting Horizontally

Selecting 'Horizontally' in the 'Show channels in agreement grid' displays the communication channels in the agreement grid side by side all in one line per agreement.



'Horizontal' selection on 'Show Channels on agreement grid'



#### **Selecting Vertically**

Selecting 'Vertically in the 'Show channels in agreement grid' displays the communication channels in the agreement grid line by line – each channel in one line. This presentation has an additional parameter called Expand Channels.

Expand Channels allow the user to configure the presentation of the communication channels as clearly arranged as possible. They can select how compact the vertical alignment of channels should be.

- N (None) All channels are collapsed into one line per agreement
- A (AII) All channels of all agreements are expanded. The number of channels of all agreements of a company or customer is the number of lines.
- **D (Default)** Only the channels of the default agreement are expanded, the others are collapsed.



Vertical' selection on 'Show Channels on agreement grid' and 'Expand Channels' options



# 3.2 Defining methods, channels and statements

To create a statement, first you need to create channels and methods.

A channel of communication is defined as a category of communication. For example, electronic. A channel can contain several methods of communication For example, the channel electronic could contain both the following methods; SMS and e-mail.

A Data Protection Statement (DPS) can contain one or more channels of communication. Customers can give their consent to each associated channel in a Data Protection Agreement (DPA). By agreeing to a channel, a customer is also agreeing to its associated methods.

The next sections will run through the steps required to create an example setup for the new data protection functionality.

#### 3.2.1 Methods

The methods tab contains a grid presenting the existing methods.

💼 CRM add-ons parameter configuration utility - CRM add-ons (kcc/993)			_	×
File Edit Tools Help				
Exit Amend Cancel Save Grid	edit Help			
Project parameters	Data protection parameters	s - Company: MK/01		 
😥 🎲 Campaign parameters	General Methods Channels	Statements		
🗄 🧔 CRM parameters	Concide ( Concert Conditional			1
CRM documents	Methods			
CRM notification parameters	Method description	Fielda		
Data Controller Information parameters	Mabile Phone	MK tarret PHONE 4		
Data protection parameters	SMS	MK targt PHONE 4>		
01 Support TEST 1	Comp Main	MK compy PHONE<1>		
02 - Support Company 02	Fax	MK targt PHONE<3>		
03 - Support Company 02	Email	MK.targt.EMAIL		
04 - Support Company 04	Home Phone	MK.targt.PHONE<1>		
05 - Support Company 05	Work Phone	MK.targt.PHONE<2>		
06 - Support Company 06	Comp Fax	MK.compy.PHONE<2>		
07 - Support Company 07	POST			

Methods tab within Data Protection parameters

To create, amend or delete a method the user should first switch to the 'Amend' mode of the parameters.



Selecting 'Amend' within the parameters section



A right-click into the grid opens a context menu to start the methods maintenance program or to delete a method directly.

💼 Method details - Amend			$\times$
r File Help			
Close Save Help			
n Method description:	SMS	 	
n Add a field to the current method			
Field name	Add?		
MK.targt.PHONE<1>	~		
MK.targt.PHONE<2>			
MK.targt.PHONE<3>			
MK.targt.PHONE<4>	~		
MK.targt.EMAIL			
MK.targt.ADDRESS<1>			
MK.targt.ADDRESS<2>			
MK.targt.ADDRESS<3>			
MK.targt.ADDRESS<4>			
MK.targt.ADDRESS<5>	¥		

#### **Description of method details**

Creating a method - If the method description field is empty, a label needs to be entered. This
field is mandatory. It is used to check whether another method with the same description
exists. The check is case sensitive. If another identical method exists, the following message
appears:

Method de	etails	×
	A method with the same description already exists. Please use another method description.	
	ОК	]

Pop-up if a method with the same description already exists





- Amending a method The method label can be changed and the user can change the selection of fields.
- Associating a method with fields The user can select at least one of the existing fields to
  associate with the current method by left-clicking the Add?-column.

**Note:** Currently only a variety of address information of the files MK.targt and MK.compy are available. This can be extended if necessary.

💼 Method details - Create			—	×
File Help				
Close Save Help				
Method description:	Mail (	Customer		
Add a field to the current method				
Field name	Add?			
MK.targt.PHONE<4>		^		
MK.targt.EMAIL				
MK.targt.ADDRESS<1>	~			
MK.targt.ADDRESS<2>	~			
MK.targt.ADDRESS<3>	¥			
MK.targt.ADDRESS<4>	<ul> <li>✓</li> </ul>			
MK.targt.ADDRESS<5>	×			
MK.targt.POSTCODE				
MK.compy.PHONE<1>				
MK.compy.PHONE<2>		¥		

The user sees here the method "Mail Customer". Associated with this method are the following fields:

MK.targt.ADDRESS<1> MK.targt.ADDRESS<2> MK.targt.ADDRESS<3> MK.targt.ADDRESS<4> MK.targt.ADDRESS<5> MK.targt.POSTCODE

In the methods grid, the user can left-click into the '*Fields*' column. If the method is associated with more than one field, a drop-down opens to display all mapped fields of that method.

**Note:** This development only foresees the association of methods with channels, so they can be displayed for information only in the channel details area of the Data protection tab. In turn, this development allows the association of a method with an Autoline field so that future developments could potentially update these fields. This is not within the scope of this document however and no developments will make use of this mapping at this time.



# 3.2.2 Channels

The channel tab contains a grid presenting the existing channels.

📾 CRM add-ons parameter configuration utility - CRM add-ons (kcc/993)					×	
File Edit Tools Help						
	]   ?					
Exit Amend Cancel Save Gride	edit Help					
Project parameters	Data protection parameters - Con	npany: MK/01				
General Methods Channels Statements						
CFM documents  Channels  Channels						
Data Controller Information parameters	Channel description	Methods	Query			
Data protection parameters	Sales Marketing - SMS	SMS	SMS	^		
00 - Shared data company	Sales Marketing - Email	Email	E-MAIL			
🖬 01 - Support TEST 1	Sales Marketing - Post	POST	POST			
02 - Support Company 02	Aftersales Marketing - SMS	SMS	AFTSMS			
03 - Support Company 03	Aftersales Marketing - Post		AFTPOST			
	Aftersales Marketing - Email	Email	AFTEMAIL			

To create, amend or delete a channel, the user should first switch to the 'Amend' mode of the parameter program.

💼 CRM add-ons parameter configuration utility - CRM add-ons (kcc/993)								
File Edit Tools Help								
Image: State of the state o								
Project parameters  Project parameters  Data protection parameters - Company: MK/01  General   Methods   Channels   Statements    General   Methods   Channels   Statements    Channels								
CRM notification parameters								
Data controller information parameters Sales Marketing - SMS SMS SMS SMS		~						
Sales Marketing - Email Email E-MA	L							
Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing - F       Image: Sales Marketing - F     Image: Sales Marketing - F     Image: Sales Marketing -	MS OST MAIL 'EMA							
06 - Support Company 06 Surveys - Phone Mobile Phone SUR	PHON							



A right-click into the grid opens a context menu to start the channel maintenance program or to delete a channel directly.

The user will see here the channel 'Marketing – Post'. Associated with this channel is the following method:

'Post' with field 'MK.targt.ADDRESS<1>'

**Note:** If the current method is associated with more than one field a left-click in the *Fields* column opens a drop-down to display all associated fields.

elect a campaign type. This makes it possible to consider data protection agreements within the campaign pro



#### **Description of channel details**

 Creating a channel - If the channel description field is empty, a label needs to be entered for the new channel. This field is mandatory. It is used to check whether another method with the same description exists. The check is case sensitive. If another identical channel exists, the following message appears:

Channel d	etails	×
	A channel with the same description already exixts. Please use another channel description.	
	OK	

- Amending a channel The channel label can be changed. The user can change the selection of methods.
- Associating a channel with methods The user can select at least one of the existing methods to associate with the current channel by left clicking the Add? column.

The following parameters are described below:

- Query name
- Link to a campaign type
- Link to a letter code
- Link to a marketing activity

💼 Channel details - Amend		_		×
File Help				
Close Save Help				
Channel description:	Marketing - Post			
Query name:	POST			
Link to a campaign type:	L Letter -	]		
Link to a letter code:	N None L Letter			
Link to a marketing activity:	E E-mail			
Add a method to the current channel	C E-Mail and SMS	1		
Method description	Fields	Add?		
Post	MK.targt.ADDRESS<1>	× .		
Select a campaign type. This makes it possible	to consider data protection agreemen	ts within th	ne campai	ign pro



#### **Field Descriptions**

- Query name It can contain up to 8 alphanumeric characters and it can be used in general routines to check or to update the channel status. How to use the general routines will be described in paragraph <u>MS routines for use in Report Generators and data extracts</u>
- Link to a campaign type maps a campaign type to a channel. The dropdown shows all
  valid campaign types of Autoline plus the value 'None'. If the user selects 'None', this channel
  will not be evaluated in the Campaign tool. Otherwise the channel status will be checked in
  case of a campaign of the selected type. See also paragraph <u>Campaigns</u>

<b>.</b>	
💼 Channel details - Amend	– 🗆 🗙
File Help	
Close Save Help	
Channel description:	Marketing - Post
Query name:	POST
Link to a campaign type:	L Letter 💌
Link to a letter code:	A Letters to both address
Link to a marketing activity:	N None 2 Letters to home address
Add a method to the current channel	3 Letters to business address
Method description Post	A Letter's to both addresses 4 Telephone 5 E-mail 6 SMS C E-Mail and SMS
Select a letter code. This makes it possible to c	consider data protection agreements within the letter writer via the

Link to a letter code – this maps a letter code to a channel. The dropdown shows all valid letter codes for the Autoline system, the option 'None' and two summing up options: 'A – Letters to both addresses' and 'C – E-Mail and SMS'. If the user selects "None", this channel will not be evaluated in the Letter writer. Otherwise, the channel status will be checked in case of a letter with the selected code. See also paragraph Letter writer

**Note**: In some markets it is common practice not to make a difference between letters to the home or to the business address, with in relation to marketing letters. So, both types are summed up in option A. Likewise, e-mail and SMS are methods to distribute marketing news electronically. If the customer gives his consent to receive marketing news electronically, the dealer can decide which methods he prefers. So, both types are summed up in option C

![](_page_16_Picture_0.jpeg)

💼 Channel details - Amend		□ X
File Help		
Close Save Help		
Channel description:	Marketing - Post	
Query name:	POST	
Link to a campaign type:	L Letter 💌	
Link to a letter code:	A Letters to both address	
Link to a marketing activity:	N None <	
Add a method to the current channel	N None T Telephone	
Method description	S SMS	Add?
Jrosi	C E-Mail and SMS F Fax	
Select a marketing activity. This makes it poss	ible to consider data protection agreements	within the marketing
CPM add-opr parameter configuration utility - CPM add-		X
File Edit Tools Help	(KCC) 555)	
Fit Amend Cancel Save Gridedit Help		
Project parameters Data protect	tion parameters - Company: MK/02	
Campaign parameters General Me	ethods   Channels   Statements	1
CRM documents Data pro	tection statements	
Data Controller Information parameters Statement	t description Version Query CS MS From 1 SIMI IE 00 23/03/2018 terrent Dasks 12 ICR 00 19/04/2019	
00 - Shared data company		
07 - Support Company 07		
09 - Support Company 09		
T1 - Support Company 11     X4 - CRM add-ons     X4 - CRM add-ons     Deal	er Statement - Dealer	
	• 1	
Information		

Link to a marketing activity – this maps a marketing activity code to a channel. The dropdown shows all valid marketing activity codes of the Autoline system, the option 'None' and the summing up option 'C – E-Mail and SMS'. If the user selects 'None', this channel will not be evaluated when a marketing activity should be started. Otherwise, the channel status will be checked. See also paragraph <u>Marketing activities</u>.

**Note**: E-mail and SMS are methods to distribute marketing news electronically. If the customer gives his consent to receive marketing news electronically the dealer can decide which methods he prefers. So both options are summed up in value C

![](_page_17_Picture_0.jpeg)

# 3.2.3 Statements

The statements tab contains a grid presenting the existing Data Protection Statements (DPS) and a tree section where the user can look at an overview over the structure of every DPS.

![](_page_17_Picture_4.jpeg)

To Create, Create version, Amend or Delete a DPS, the user should switch to the 'Amend' mode of the parameter program.

💼 CRM add-ons parameter configuration utili	y - CRM add-ons (kcc/993)	-		$\times$
File Edit Tools Help				
Image: Second state     Image: Second state       Exit     Amend     Cancel       Save     Grid e	dit Help			
Project parameters	Data protection parameters - Company: MK/02			
Campaign parameters	General Methods Channels Statements			
CRM parameters				
CRM notification parameters	Data protection statements			
Data Controller Information parameters	Statement description Version Query CS MS From	To	,	
Data protection parameters	SIMI I SIMI IE 00 23/03/2018		/	
01 - Support TEST 1	Create			
02 - Support Company 02	Create version			
03 - Support Company 03	Amend			
04 - Support Company 04	Delete			
06 - Support Company 06	belete			
07 - Support Company 07				
08 - Support Company 08				
U9 - Support Company 09				

![](_page_18_Picture_0.jpeg)

A right-click into the grid opens a context menu to start the DPS maintenance program or to delete a DPS directly.

💼 Statement details - Amend			– 🗆 X
File Channels Help			
Close Save Am	nend channels Help	]	
Statement description:	Dealer Statement	Related channels	
Version / Query name:	Dealer / 2	Channel description	Query
Country code:	GB United Kingdom 💌	Marketing - Post	POST
Manufacturer:	00 Global data 💌		
Valid from / to:	09/04/2018 / / /		
Format stationery:	DPA		
Add an agreement:	✓		
Permissible locations:			
OEM notes:			<b>^</b>
Dealer notes:			• • • • • • • • • • • • • • • • • • •
Creator:	kcc	Date created:	09/04/2018
Last editor:	kcc	Date last edited:	09/04/2018

Here, the user sees the DPS "Dealer Statement"

Enter a description of the statement up to 30 characters. Upper and lower case are significant. An entry is mandatory.

#### **Description of statement details**

Creating a DPS - The editable fields of the Statement details screen are empty by default. The
user can enter all information about the new DPS. It will check to see whether another DPS
with the same description and version exists. The check is case-sensitive. If the same
description and version exists, a warning message will be presented. If there is a duplicate,
you will be requested to alter the description and version.

![](_page_18_Picture_8.jpeg)

![](_page_19_Picture_1.jpeg)

 Creating a DPS version - The content of all fields of the selected DPS are copied to the new DPS with the exception of the fields: 'Version', 'Valid from' and 'Valid to'. The fields 'Version' and 'Valid to' are left empty and the field 'Valid from' contains the date after the value of 'Valid to' of the selected DPS.

**Note:** If a new version of the DPS is saved the '*Valid to*' field of the base version is set to the day before the '*Valid from*' field of the new version. This has the effect that the base version won't be available when the user creates new data protection agreements for customers or companies in CRM.

• Amending a DPS - The editable fields can be changed.

#### **Field Descriptions**

- Statement description is the label of the statement. This field is mandatory.
- Version / Query name indicates the version of the statement and holds the query name of the statement.

The field version can contain up to 10 alphanumeric characters. This field is mandatory. The field query name can contain up to 8 alphanumeric characters. It can be used in general routines to check or to update the channel status. How to use the general routines will be described in paragraph <u>MS routines for use in Report Generators and data extracts</u>

It will check if the entered name is already in use with another statement. If it is, you will need to change it as you will receive the following error:

Statement		Х
	Failed to update statement	
	ОК	

- **Country code** selects a country-code from a dropdown. The dropdown contains all country codes defined in Autoline.
- **Manufacturer** selects a manufacturer code from a dropdown. The dropdown contains all active manufacturers in Autoline.
- Valid from / to the two date fields mark the period a statement is valid.
   Note: A statement is valid until it has a "valid to" date which is less then today. If there is no "valid to" date the statement is valid "forever".
- Format stationery is the three character code which indicates the format descriptor of a format stationery. This code is used to print the customer's agreement from the Data protection tab.

Note: The creation of the format stationery is outside the scope of this development.

 Add a default agreement – adds this statement automatically as an agreement to a newly created customer or company.

![](_page_20_Picture_0.jpeg)

- Permissible locations are checked in the Campaign tool. If the Autoline system works with location based agreements (see general parameters) the permissible locations are tested against the valid locations of the current user. The campaign tool user sees only the statements which are valid for his allowed locations.
- **OEM notes** give the possibility to add some manufacturer specific remarks.
- Dealer notes give the possibility to add some dealer specific remarks.
- Creator is the user who first defined this statement.
- Date created is the date this statement was defined.
- Last editor is the user who last changed this statement.
- Date last edit is the date this statement was last changed.

Clicking the 'Amend' button allows the user to add or to remove channels to the current statement.

In the below screenshot, the user sees the statement "Dealer Statement". Associated with this statement are the channels

- Email associated with method Email
- SMS associated with method SMS
- Home phone associated with method HOMEPHON

Home phone was recently added to the statement "Dealer Statement". Clicking the Save button or pressing STRG+S save the relations of all channels with the current statement.

When returning from the *Statements details* form, the user sees all channels belonging to the current statement in the *Channels* grid.

![](_page_20_Picture_16.jpeg)

![](_page_21_Picture_0.jpeg)

![](_page_21_Picture_1.jpeg)

Clicking the Save button or pressing Ctrl +S saves the changes mode to the current statement.

💼 Statement details - Amend  $\times$ File Channels Help 2 -Ĩ Close Amend channels Help Save Dealer Statement Related channels Statement description: Dealer Query / 2 Version / Query name Channel description Emai Country code: GB United Kingdom • SMS SMS 00 HOMEPHON Global data • Manufacturer: Home Phone Marketing - Post POST Valid from / to: 09/04/2018 1 11 DPA Format stationery: Add an agreement: 7 Permissible locations OEM notes: Dealer notes: Creator: kcc Date created: 09/04/2018 Date last edited: Last editor: kcc

Note: The statement details are described in paragraph Description of statement details

In the tree section of this tab the user can see the structure of every existing statement DPS with the levels statement – channel –method – field. As an example the structure of statement "Dealer Statement" is expanded.

💼 CRM add-ons parameter configuration utility	ty - CRM add-ons (kcc/993)	-		×
File Edit Tools Help				
Exit Amend Cancel Save Grid e	l 🤔 dit Help			
Project parameters	Data protection parameters - Company: MK/02 General   Methods   Channels   Statements   Data protection statements			
CRM notification parameters	Statement description Version Query CS MS From	То		
Data controller monitation parameters	SIMI 1 SIMI IE 00 23/03/2018	1	/	
00 - Shared data company	Dealer Statement Dealer 12 IGB 00 109/04/2018		/	
O2 - Support Company 02     O3 - Support Company 03     O3 - Support Company 04     O5 - Support Company 06     O7 - Support Company 07     O8 - Support Company 07     O8 - Support Company 09     O9 - Support Company 10     O1 - Support Company 10     O3 - Support Company 10     O3 - Support Company 10     O3 - Support Company 10     O4 - Support Company 10     O5 - Support Company 10	<ul> <li>□- Dealer Statement - Dealer</li> <li>□- Email</li> <li>□- Home Phone</li> <li>□- Marketing - Post</li> <li>①- SMS</li> <li>①- SIMI - 1</li> </ul>			

![](_page_22_Picture_0.jpeg)

# 3.3 Defining statuses

This feature gives the flexibility to change status descriptions for specific manufacturers and to change to different picture schemes.

The Statuses tab contains a grid presenting the existing status codes for Data Protection Agreements (DPA).

CRM parameter configuration utility - CRM (k	cc/1)		
<u>File E</u> dit <u>T</u> ools <u>H</u> elp			
Exit Amend Cancel Save Grid ed	it Help Data proto Statuses   Data p	ection parameters - Comp rotection statuses	any: MS/X4
Data protection parameters		D	<b>P</b> 2 <b>M</b>
00 - 00 Marketing company	Status	Armod	MS/pictures /TL Groop ice
UI - BMW	A	Agreed	MS/pictures/TL_Green.ico
10 - Daimler	D	Denied Partially arread	MS/pictures/TL_Neta.ico
	F	Linknown	MS/pictures/TL_Tellow.ico
		Abart to anning annual	MS/pictures/TL_OILCO
	l\$	About to expire - agreed	MS/pictures/TL_RedGreen.co
Information			
			Release: 2.0

**Note:** If the program finds an empty status file the default content (see above) will be loaded automatically.

To amend or delete a status code for DPAs, the user should switch to the Amend mode.

![](_page_23_Picture_0.jpeg)

A right-click into the grid opens a context menu to start the status code maintenance program or to delete a status code directly.

**Note:** Please keep in mind: If you delete a status code, it is very likely that the program won't work correctly.

Image: Armend Cancel Save       Grid edition         roject parameters       Grid edition         Image: Campaign parameters       Grid edition         Image: Campaign parameters       Grid edition         Image: CRM parameters       Grid edition	t Help Data prote Statuses	ection parameters - Com rotection statuses	pany: MS/X4	
00 - 00 Marketing company	Status	Description Agreed	Picture file MS/pictures/TL	. Green.ico
formation	D P U X Y	Denied Partially agreed Unknown About to expire - agreed About to expire - partial	Amend Delete MS/pictures/TL	edico ellow ico ff.ico ledGreen ico RedYellow ico

The user sees here the status code "D". The code can't be changed.

Status details		
<u>Eile H</u> elp		
Close Save		
A	D	
Agreement status:		
Description:	Denied	
Status <u>l</u> evel:	B Base level 🗨	
Picture file:	MS/pictures/TL Bed ico	*

![](_page_24_Picture_0.jpeg)

#### **Description of status fields**

When amending a status code the editable fields can be changed.

💼 Status details		
<u>F</u> ile <u>H</u> elp		
Close Save		
Agreement <u>s</u> tatus:		
Description:		
Status level:	B Base level	
<u>P</u> icture file:	B Base level C Compound level X Waming & base level Y Waming & compound leve	苷

#### **Field Descriptions**

• Agreement status - one character represents the status code. This field is not editable.

Description - is the label of the status code

• **Status level** – restricts the use of a status code. The field is mandatory.

Status codes are used on channel (base level) and on agreement level (compound level). Status codes - 'C' (compound level) and 'Y' (Warning & compound level) will only be used on agreement level if the c onsent to the channels of an agreement is only partially 'P' - Partially agreed. The warning relates to the '*Valid to*' field of a statement and parameter '*Days to indicate the expiry date*'. If a statement reaches it's validity date the warning level of a status will be used, which display a special warning icon.

• *Picture file* – indicate the path and file name of the picture for the current status code

#### 3.4 Controller identification

Note: Level 7 access to Manufacturer Systems / X4 CRM add-ons is required.

The controller identification can be configured via the following menu:

- Manufacturer Systems
- > X4 Add-Ons CRM
- Generic CRM parameters menu
- CRM parameters
- > Data Controller Identification Parameters

Select 'Amend' from the menu option and enter the data controller information. It is possible to enter an Autoline user id or manually enter details as required.

![](_page_25_Picture_0.jpeg)

💼 Add Ons CRM parameter configuration utility (MS/X4) (kcc/1024)	
File Edit Tools Help	
Image: Save     Imag	
Project parameters	
Campaign parameters     CRM parameters     CRM Connerts     CRM conne	
CAID Ons CRM parameter configuration utility (MS/X4) (kcc/1024) File Edit Tools Help	- 🗆 X
Image: Second Conceller	
□ Project parameters	Data Controller Information parameters - Company: MK/01
E 🚯 Campaign parameters	Data controller information of GDPR
CRM parameters	Autoline User: tcom User COM
B- C CRM documents	Data Controller Name: User COM
GRM Lead parameters	Contact Information 1: UserCom@cdk.com
B- B CRM lead web Services	Contact Information 2: +1234567890
E 🚳 Data Controller Information parameters	
00 - Shared data company	
Oata protection parameters	
B General CHM parameters	

This information will be able to be used (if original document is adapted) on the Data Protection Agreement (DPA) providing data controller information.

# 3.5 CRM Notification

The right to notification foresees that when personal data is modified the dealer should notify any third parties with which this personal information is being shared to advise them of this new modification. Following this, a pop up message can be displayed to the user every time a CRM field is updated. This functionality has to be activated and configured.

Notification process can be configured via the following menu:

- Manufacturer Systems
- > X4 Add-Ons CRM
- Generic CRM parameters menu
- CRM parameters
- CRM Notification Parameter

![](_page_26_Picture_0.jpeg)

Select 'Amend' from the menu option Enable 'Active on target' and 'Active on company' (if required)

![](_page_26_Picture_3.jpeg)

Once activated and configuration completed, every time a CRM customer/company record is updated the configured message will appear to the user.

2						
CDK User's CR	M - Support TES	F 1 (kcc/993)				- 🗆 X
File Reports To	ools Customer	options Contact	details Telephony Hel	p		
Exit Open	Close Ed	it Save V	Wizard Letters Com	a) 🛐 🧭 🙀 ( pl Satisfa No No Extra d A	1 Contac Chain	Auto I Show c
CRM Shortcuts	Find record:		🖁	Mrs Test Record		
My Shortcuts	Summary Custo	mer Additional Det	ails   Associated vehicles   CF	RM documents   Data protection		
( <b>1</b>					TPS	5
	Title/Initials:	02 💌 Mrs	Т	Home phone:		
My CRM	First name:	Test		Work phone: 0845 30313	00	
	Sumame:	Record		Work extension:		
		'		Makila akaan		
Company	California		E CDK User's CRM	-  ×		
Company	Salutation:	Mrs Hecord	Personal inform	nation has been modified. These	/	
			changes must	be reported to whom we already		
<b>4</b> 3			supply with da	-		)
Customer			ОК	Cancel		
	Address:	1 Cygnet Way Hungerford	3			
		Berks		XXX Did not Ask!	•	
Vahiala	UK Edit			Status:		
venicie				L Live - Direct Mail	•	
	Postcode:	RG170YL		Transport type:		
	Stop all mail:	Ser	nsitive customer:		•	

![](_page_27_Picture_1.jpeg)

# 3.6 Prevent copy & paste tables and data grid information

In order to secure personal data, a new control at the user's level was developed in order to prevent the Autoline functionality of copying data by right-clicking with the mouse button plus the CTRL key and pasting to applications such Microsoft Excel.

This needs to be configured for each user via the following menu:

- System Utilities
- > Management Menu
- User Details

Then, load the required user

A new option can be seen on the System tab, which if activated (flagged on), restricts the user from copying & pasting data from tables, grids or ad-hoc enquiries.

💼 User details (SU/00) (kccabpp/1007)	
File View Edit Index Advanced Hel	p
Exit First Previous Next La	X D ♥ ♥ X D ♥ C C C C C C C C C C C C C C C C C C
User ID: Kccabpp	Guest   EL Sundry Orders   Ielephony   Deplay User Access
Utilities Button	Miscellaneous
Administrator:	Mandatory Cost Centre:
Eeet system: N	NL cost centre: 0
CRM:	Employee number:
Fax queue: N	Print contact sheets:
Spooler: If	E-mail-junt group:
Enable Report Generator: Y	
Disable grid copy:	Advanced system user:
·	Automatic write-off variance: 0.00
	Offer warring messages:
Excel Setup	Default POS company in CRM:
Excel row identifier	
Excer gournin identitier	Employee start date: / /
	Employee leaving date: / /
Enter userid	Record loaded OK

![](_page_28_Picture_1.jpeg)

# 4 Program description

The Privacy Statements and Data Protection enhancement shows the new "Data protection" tab on the CRM customer and company records.

In short, this tab is where dealers will be able to record whether or not a customer has given his or her consent to be contacted by the dealer using particular channels of communication in relation to marketing activities. It will also allow the dealer to do this on behalf of its partners such as manufacturers and third parties.

Each market will define its own channels of communication so the new *Data protection*' tab has been designed to allow for a flexible setup.

# 4.1 Traffic light system

A traffic light system will be used in all Autoline modules the software is applied to (CRM, POS, VS, CM and SR) to draw attention to the fact that one or more DPAs exist for the customer or company. Different icons will be used depending on the status of the DPA.

The traffic light system will also be used in the channel details area and in the case file

Should more than one DPA exist for the customer or company then the icon will reflect the status of the default DPA.

If the setting 'Activate location based agreements' has been set, then there will be an extra column in the grid where a default agreement per location can be set. In this case, the traffic light for the default agreement set for the main location of the user accessing the record will be shown. The user's main location will be derived from the GB user record.

Icon	Status	Description
8	Unknown	Customer has not been asked yet to opt-in to any channels
	All channels denied	Customer has declined to opt-in on all channels
8	All channels agreed	Customer has agreed to opt-in on all channels
8	Channels partially agreed	Customer has only agreed to opt-in on some channels
	Agreement about to expire All channels agreed	Customer has agreed to opt-in to all channels but agreement is about to expire
	Agreement about to expire Channels partially agreed	Customer has only agreed to opt-in on some channels and agreement is about to expire

![](_page_29_Picture_0.jpeg)

# 4.2 Data Protection tab

*The Customer must opt-in* - By default the agreed channels of communication for a DPA are not selected as a customer must opt-in to a channel of communication. Selecting a cell in one of the communication channel columns (post, phone or electronic) indicates the customer has given their explicit consent to be contacted by that channel of communication in relation to that agreement. If there is no tick in a channel column for an agreement then the customer has not given their consent and this channel of communication is not permitted.

The following screenshots and related descriptions give an overview of different setups and of the functionality.

Broadly speaking, the tab is divided into two main areas:

- Agreements
- Agreement details

#### NOTE - Shortcuts is not currently available functionality

Within the '*Agreements*' frame, the agreements grid provides a quick overview of the customers' data protection agreements (DPAs) with the dealer and partners. In the following example screenshot, we can see the customer has one DPA: One with the dealer itself (Aftersales Agreement).

File	Reports	Tools	Customer	options	Contact det	tails Telepho	ny Help				
Exit	Oper	ັ່ງ [ n C	ilose 🖉	🖻 Edit	Save 1	Wizard L	etters Comp	a Satisfac No Notes Extra det.	Audit Contac	t Chain	Auto Io Show c
CRM My S	Shortcuts Shortcuts	Find re Sumn	ecord: nary   Custo	omer   Add	itional Details	Associated veh	icles   CRM doc	uments   Data protection			
M	CRM		Mfr Use	Data prote Aftersales	ction agreeme Agreement	nt		Dft Last updated Channels Ø9/04/2018 Aftersales A	greement (8)		Status
Co	ompany										
	2		greement de greement:	etails	Aftersales Agr	eement		Channel	Status		Shortcuts Functions
Cu	istomer	D	efault / Use	e:	✔ P	Version:	1.0	Aftersales Marketing - SMS Aftersales Marketing - Post	A	Agreed	
		Va	alid from:	j	01/01/2018	Valid to:	11	Aftersales Marketing - Email	Ā	Agreed	
	2	C	ountry:		GB	Mfr:	00	MOT/Service Reminders - POST MOT/Service Reminders - SMS	A	Agreed 🙀	
v	'ehicle	0	EM notes:				^	MOT/Service Reminders - Email MOT/Service Reminders - Phone Aftersales Marketing - Phone	A A U	Agreed Agreed Agreed Agreed	
		D	ealer notes:	:			^	Method Email			
		G	reator:		kcc	Created:	09/04/2018				
		La	ast editor:	j	kcc	Edited:	09/04/2018				
									00000252	Display Mode	

![](_page_30_Picture_0.jpeg)

# 4.2.1 Agreements

The agreements section contains the agreement grid. All data protection agreements of the current customer or company are listed in the grid. From here, the dealer can look at the status of all agreements or create, amend, print or delete agreements.

The look of the agreements grid depends on parameter set. The channels of communication and their status can be arranged vertically or horizontally.

Vertical arrangement of channels

If a vertical arrangement is chosen, there is an additionally possibility to configure the default "expand / collapse behavior" of the channels.

This is the parameter set for the vertical arrangement

Show channels on agreement grid:	V	Vertically	•
Expand channels:	N	None	•
	N	None	0
	A	All	40
	D	Default	

In the following the effects of the parameter *Expand channels* are displayed:

None of the channels of an agreement is expanded

Agreements				
Mfr Use Data protection agreement	Dft	Last updated	Channels	Status
O0 P Aftersales Agreement	1	09/04/2018	Aftersales Agreement (8)	

All channels are expanded

Agreements

Mfr Use Data protection agreement	Dft	Last updated	Channels	Status
00 IP Aftersales Agreement	V	09/04/2018	Aftersales Marketing - SMS	
			Aftersales Marketing - Post	
			Aftersales Marketing - Email	
			MOT/Service Reminders - POST	
			MOT/Service Reminders - SMS	
			MOT/Service Reminders - Email	<u></u>

![](_page_31_Picture_0.jpeg)

Only the channels of the default agreement are expanded

Data protection parameters - Company: MK/01	
General Methods Channels Statements	
General parameters to activate DPA	
Activate agreements on customers:	✓
Activate agreements on companies:	✓
Activate location based agreements:	
Include cases without an agreement?:	Γ
Activate auditing on agreements:	
Activate audit log on agreements:	
Days to indicate the expiry date:	5
Show channels on agreement grid:	V Vertically
Expand channels:	Default
	N None
	D Default

Horizontal arrangement of channels

If a horizontal arrangement is chosen, all channels of the agreements of the current customer are displayed side by side.

H

This is the parameter set for the horizontal arrangement

Show channels on agreement grid:

Horizontally

•

![](_page_32_Picture_0.jpeg)

To display the largest number of channels possible in the grid the width of the channel columns is maybe too short to show the complete description of the channel.

💼 CDK User's	CRM - Support TEST 1 (k	cc/993)											-	
File Reports	Tools Customer optio	ns Contact det	ails Telepho	ny Help										
Exit	Open Close	Edit	Save	Wizard mo	Letters	(A) Complaints	Satisfaction	No Notes	Extra details	(1) Audit	Contact	Chain	Solution Auto looku	Show caller
CRM Shortcuts	Find record:			🔜 🛿 Mrs	Test									
My Shortcuts	Summary Customer	Additional Details	Associated veh	icles   CRM docur	ments   Data p	protection								
2	Agreements	ction agreement						Default Last u	updated Aftersale:	Aftersales A	ftersales MOT/Sen	MOT/Serv MO	T/Serv MOT/S	Serv Aftersales
My CRM	00 IP Aftersales	Agreement						✓ 09/04	1/2018	Ŧ	H H	<u>N</u>	8 8	<b>)</b>
Company														
2	Agreement details	Aftersales Agre	eement		Channel						St	atus		Shortcuts Functions
Customer	Default / Use:	V P	Version:	10	Aftersales I	Marketing - SMS					A	Agreed	_ <u>₩</u> ′	
	Valid from:	01/01/2018	Valid to:		Aftersales   Aftersales	Marketing - Post Marketing - Email					D	Denied Acreed		
<b>6</b>	Country:	GB	Mfr:	00	MOT/Serv	ice Reminders - F	OST				A	Agreed	- #	
io_oi	OEM notes:			)	MOT/Serv	ice Reminders - 3 ice Reminders - B	mail				A	Agreed Agreed	貫	
Vehicle					MOT/Serv	ice Reminders - P	hone				A	Agreed	- #	
				~	Attersales	Marketing - Phone	•				U	Unknow	MT B	
	Dealer notes:			^	Method									
					Email									
				~										
	Creator:	kcc	Created:	09/04/2018										
	Last editor:	kcc	Edited:	09/04/2018										

#### **Customer and company agreements**

The Privacy Statements and Data Protection enhancement offers the possibility to declare a data protection agreement between the dealer side and an individual customer. This seems to be the preferable way to handle data protection against the background of the Autoline philosophy to bind all processes to individuals and the European General Data Protection Regulation (GDPR), which demands the opt-in of a customer concerning the handling of his data.

Nevertheless, the software can also handle data protection agreements for companies.

This is the parameter set to activate data protection agreements for customers and companies

Activate agreements on <u>c</u> ustomers:	~
Activate agreements on companies:	~

The second column of the agreement grid has either a "P" (personal) or "C" (commercial) in it to indicate at which level the agreement was made. "P" indicates that the agreement was made by the customer. In this example both agreements are for personal use.

Agreements	
Mfr Use Data protection agreement	Default Last updated Aftersales Aftersales Aftersales MOT/Serv MOT/Serv MOT/Serv MOT/Serv Aftersales
00 P Aftersales Agreement	· ✓ 09/04/2018 🕴 🌴 👭 👭 👭 👭 🗍

![](_page_33_Picture_0.jpeg)

#### **Default agreement**

The default column indicates the default agreement with a customer or a company. A customer may have two cars each with a different franchise, for example, franchise XYZ and franchise ABC. If the customer deals only infrequently with the dealer in relation to franchise XYZ but often in relation to franchise ABC then the ABC agreement can be flagged as the default agreement.

There are several places in Autoline (POS, VSB, SR) where only one agreement can be shown by default and this flag will be used to determine the icon (representing the status of the default DPA) to display.

If the setting '*Activate location based agreements*' has been set then there will be an extra column in the grid where a default agreement per location can be set. In this case, the default agreement set for the location of the user accessing the record will be shown. The user's location will be derived from the GB user record.

Γ	Agreements	_	1								
	Mfr Use Data protection agreement	Default	Last updated	Aftersales	Aftersales	Aftersales	MOT/Sen	MOT/Sen	MOT/Serv	MOT/Serv A	ftersales
	00 IP Aftersales Agreement		09/04/2018	<b>H</b>	Ť	8					

**Note:** It is checked that there is only one default agreement per customer or company. If the setting '*Activate location based agreements*' has been set then it is checked if there is only one default agreement per customer and branch (location).

#### Location-based agreements

By default, only one agreement per CRM company can be created against a customer or company. If however "Activate location based agreements" has been ticked in the *General parameters* setup then an agreement per location (branch) per CRM company can be created.

This is the parameter set for the location (branch) based agreements

Activate location based agreements:

If the parameter is ticked an additional column is displayed in the agreements grid indicating the branch (location) the agreement is belonging to.

[	Agreeme	nts												
	Mfr Use	Branch	Data protection	agreement	Default	Last updated	Aftersales	Aftersales	Aftersales	MOT/Serv	MOT/Serv	MOT/Serv	MOT/Serv	Aftersales
	00 P		Aftersales Agree	ement		09/04/2018	i.	j.	1	Ì	1	Ì	1	1

![](_page_34_Picture_0.jpeg)

# 4.2.2 Handling of agreements and agreement details

In the following, it is explained how to create, amend, print or delete an agreement. Also the *Agreement details* section is described in detail.

To perform one of the above mentioned actions the user should switch to the amend mode for the current customer or company in CRM.

#### Create an agreement

To create an agreement, a user can right-click in the heading or in every agreement line of the agreement grid. After the right-click in the heading a context menu with the option '*Create*' appears. The right-click in a line opens a context menu with the all options for the handling of agreements.

Right-click into the header line of the grid

_															
File	Reports	Tools	Customer	options	Contact de	tails Telepl	nony He	lp							
Exi	t Open	) 🚺	<b>Se</b> Edi	it Sa	ave Wiza	rd Lette	rs Com	) 📲	No No	Extra d	(1) Audit	Conta	Chain	Auto I	show
CRM Shortcuts         Find record:         Ill         Ill         Mrs         Test           My Shortcuts         Summary   Customer   Additional Details   Associated vehicles   CRM documents   Data protection           Data protection															
	My CRM	-/	Agreements-	Cre	ate								D	efault <mark>Last up</mark>	dated

Right-click into a data line of the grid

The user should now click the option 'Create'.

![](_page_35_Picture_0.jpeg)

The next step is the selection of one of the existing DPSs from the statement grid. The DPSs were defined in the parameter program in tab *Statements* 

elect a statement to create a	in agreement						7
Mfr Country Version S	tatement description	From To	Notes				
DO IE I S DO GB Dealer D	IMI lealer Statement	09/04/2018 / /					
greement details	Dealer Statement	Statement version:	Dealer	Channel Email	Status		Shortcuts Functions
atement valid from:	09/04/2018	Statement valid to:	/ /	SMS Home Phone	U	Unknown Unknown	
Statement country:	GB	Statement manufacturer:	00	Marketing - Post	U	Unknown	
DEM notes:			^				
Dealer notes:			^ ~	Method Email			
		Date created:	09/04/2018				
Creator:	kcc						

The user selects a statement either with a left double-click or with a right-click and clicking the '*Copy*' option of the context menu in the example.

The fields of the selected DPS are copied into the *Agreement details* section and are the basis for the customer or company's DPA.

#### **Field Descriptions**

- Agreement description is the label of the agreement. This field is mandatory.
- Use indicates whether the agreement can be used for a customer (i.e. "P" personal) or a company ("C" - commercial). Creating a customer agreement this field has value "P". Creating a company agreement this field has value "C". This field is not editable.
- Default flags this agreement as default which means that the status of this agreement is displayed as a traffic light symbol in different modules in Autoline.
- **Statement version** displays the version of the underlying statement. This field isn't editable.
- **Statement valid from** displays the date from which on the underlying statement is valid. This field isn't editable.
- **Statement valid to** displays the date from which on the underlying statement is invalid. If this field is empty the statement remains valid unlimited. This field isn't editable.
- **Statement country** displays the country code of the underlying statement. This field isn't editable.

![](_page_36_Picture_0.jpeg)

• **Statement manufacturer** – displays the manufacturer code of the underlying statement. This field isn't editable.

*Note:* The fields named Statement are not copied to an agreement record. They are displayed directly from the statement which is the base of the current agreement.

- **OEM notes** give the possibility to add some manufacturer specific remarks.
- **Dealer notes** give the possibility to add some dealer specific remarks.
- **Creator** is the user who first defined this agreement. This field isn't editable.
- **Date created** is the date this agreement was defined. This field isn't editable.
- Last editor is the user who last changed this agreement. This field isn't editable.
- Date last edit is the date this agreement was last changed. This field isn't editable.

The channel grid in the agreement details section displays the communication channels belonging to the DPS. The initial status of all channels in the *Create* process is *Unknown*. Here, the dealer enters the consent or denial to every communication channel of the DPA declared by a customer or a company.

The method grid displays the methods belonging to the first channel in the grid or the channel last selected. This is for information only.

Eile	Create a new Data Prote Help	ction Agreement					-		×
Clos	save Help								
	Select a statement to creat	te an agreement	Free T-	N-t					
	00 IE 1 00 GB Dealer	SIMI Dealer Statement	23/03/2018 / / 09/04/2018 / /	Notes					
Γ	Agreement details						Shortcut	5	
	Agreement description: Default / Use:	Dealer Statement	Statement version:	Dealer	Channel Email SMS	Status           A         Agreed         Status           A         Agreed         Status	Function	IS	
	Statement valid from: Statement country:	09/04/2018 GB	Statement valid to: Statement manufacturer:	00	Home Phone Marketing - Post	U Unknown			
	OEM notes:			×					
	Dealer notes:			<	Method Email				
	Creator:	kcc	Date created:	09/04/2018					
	Last editor:	kcc	Date last edited:	09/04/2018					

**Note:** Selecting the status '*Agreed*' of the communication channel indicates the customer or the company has given their explicit consent to be contacted by that channel of communication in relation to that agreement. If status is 'Denied' or 'Unknown' for a channel of an agreement then the customer or company has not given their consent and this channel of communication is not permitted.

![](_page_37_Picture_0.jpeg)

**Note:** The adding, deleting and amending of agreements can be audited using Autoline's existing database auditing functionality. Please don't forget to configure necessary entries in the auditing database in:

- > System utilities
- Management menu
- Database auditing
- > Audit control

Please see the section on 'Defining the General Parameters' for audit set-up.

#### Print an agreement

To print an agreement, a user can right-click in every agreement line of the grid. After a rightclick a context menu with the options *Create, Print* and *Delete* appears, as shown in the example below.

Find record:		8 Mrs Test	
Summary Customer Additional De	tails Associated vehicles	es CRM documents Data protection	
Agreements	nent		Default Last updated
00 P Dealer Statement			09/04/2018
,	Create		
	Print		
	Delete		
		af	

If a format stationery is stored in the underlying DPS the user can click the *Print* option and the current agreement will be printed.

#### Delete an agreement

To delete an agreement, a user can right-click in every agreement line of the grid. After a right-click a context menu with the options *Create, Print* and *Delete* appears, as shown in the example below.

Summary Customer Additional Details As	sociated vehicles   CRM	documents   Data protection
Agreements		
Mfr Use Data protection agreement		Default Last updated
00 IP Dealer Statement	Create	✓ 09/04/2018
	Print	
	Delete	

To delete an agreement, a user with the required priority level should click the *Delete* option. The priority to delete agreements is set in:

- Manufacturing Systems
- > X4 CRM Add-ons menu
- Generic CRM parameters
- > Data protection parameters
- Priority to delete agreements

![](_page_38_Picture_1.jpeg)

General parameters to activate DPA	
Activate agreements on customers:	✓
Activate agreements on companies:	
Activate location based agreements:	
Include cases without an agreement?:	
Activate auditing on agreements:	✓
Activate audit log on agreements:	
Days to indicate the expiry date:	0
Show channels on agreement grid:	H Horizontally
Days to keep expired agreements:	0
Priority to delete agreements:	0 🗸
Priority to view expired agreements:	8 💌

You can set a priority for a user to be able to view expired agreements, which can be set on the General tab within Data protection parameters as detailed above. The field is called 'Priority to view expired agreements'. Any users with lower than this CRM priority will not be able to see an expired agreement on the customer record.

**Note:** The adding, deleting and amending of agreements can be audited using Autoline's existing database auditing functionality. Please don't forget to configure necessary entries in the auditing database in:

- > System utilities
- Management menu
- > Database auditing
- > Audit control

Please see the section on 'Defining the General Parameters' for audit set-up

#### Amend an agreement

To amend an agreement, a user switches to the *Edit* mode in CRM.

All editable fields in the *Agreement details* section (shown in light green) can be changed. See paragraph <u>Create an agreement</u> for the explanation of the meaning of the fields.

**Note:** The adding, deleting and amending of agreements can be audited using Autoline's existing database auditing functionality. Please don't forget to configure necessary entries in the auditing database in:

- > System utilities
- > Management menu
- Database auditing
- Audit control

Please see the section on 'Defining the General Parameters' for audit set-up.

![](_page_39_Picture_0.jpeg)

#### View the Audit log for an agreement

In addition to activating the existing core database auditing, if the general parameter "Activate audit log on agreements" has been selected then an audit record is created each time the status of a channel is changed and the customer saved. This log can be viewed by right-clicking on an agreement in the "Agreements" grid and selecting "View audit log".

Find record:	
Summary   Customer   Additional Details   Associated vehicles   CRM documents   Data protection	
Agreements	
Mfr Use Branch Data protection agreement Default Last updated Aftersales Aftersales Aftersales MOT/Serv MOT/Serv MOT/Serv MOT/Serv Aftersales	s
00 IP Aftersales Print Print	
View audit log	

The user will then be presented with a view of the audit log. Each audit record stores the time and date the change was made and the user ID of the user who made the change.

	Data	Protection	n Audit L	og								_			×
File	He	lp													
-	•	2													
Close	e   H	lelp													
Auc	dit rec	ords of the	current a	areement A	ftersales Aq	reemen	ıt								
Π	lser	Date cre	Time cre	Aftersales	Marketing	SMS A	Aftersales M	larketing -	Post	Aftersales	Marketing	- Fmail	MOT/	Service	
	CC	04/2018	3 13:24	Agreed	manceting	01110	Denied	lancoung	1030	Agreed	Marketing	Cindi	Unkno	own	
	c													>	

#### 4.2.3 Shortcuts

The shortcuts bar to the right of the data protection tab is currently not in use. Such functionality is outside the scope of this document.

![](_page_40_Picture_1.jpeg)

# 4.3 References to data protection agreements in other Autoline modules

The traffic light system for DPAs is not only used in CRM, but also in Point of Sale (POS), Vehicle Stock Book (VSB), CM and Showroom (SR) to draw attention to the status of DPAs for the customer or company.

*Note:* Keep in mind that the traffic light symbol represents in POS, VSB, CM and SR only the status of the default DPA of the company or customer

**Note**: There are future developments pending to facilitate clearer traffic lights in these modules.

# 4.3.1 Point of sale

In POS, the traffic light symbol is displayed on the right side of the customer name in the *Customer* section.

💼 Service Point Of Sale (CRM Customer WIP) ·	Support TEST 1 (01) - Support TEST 1 (kcc/993)	-		×
File Tools Workshop CRM Sort Links	View Reports Telephony VHC IDC Help F1			
New Op Last Save Acti Op Exit	5 1000 Construction of the second	l 🔄 en Le	獅 Sh	? Не
kcc KCC	RJ61NWC Test Car WF0GXXGAJGBM53513 1200 17/12/2011			
WIP number: 0	Account   Options   Order   Codes   Notes   Vehicle   Service   Operators   Workshop			
Customer	Account code: F0001 Forecourt Cash Sales			
Mrs A Test	Forecourt Cash ONLY			
Adp Dealer Services 1 Cygnet Way Hungerford Berkshire RG17 0YI	Currency UKL 1.00000			
Indivore .				

#### 4.3.2 Vehicle stock books

In VSB, the traffic light symbol is displayed in the Vehicle Administration form at two places:

- On the right side of the customer magic number in the Last owner's details section on the Purchase Brief tab
- On the right side of the customer magic number in the Invoice and Customer A/c Details section on the Sales Brief tab

💼 V	Vehicle Administration - Display mode [N023882] - Support TEST 1 (kcc/993) —												×
File	Display Find	der Vehicle	Tools Repor	t Help									
÷		📂 🖻	8	65	-	٢			8	Conce	?		
Exi	t New	Open Am	<b>end</b> Save	Close	N023882	Print	Log	Search	CRM	Admin	Help		
Defin	nition   Identity   S	pecification   P	urchase Brief   S	ales Brief	Finance De	etails   Nomi	nal Analysi	is   Cost Details	Costs +	Profit   Financ	e Summar	y   Emissi	[ ]
	Vehicle description	on: Clio 1.2 16	/ Expression 5Dr	Hatchbac	k		Ch	nassis number:	SJNFEAJ	11U2060322			
Г	Invoice and Customer A/c Details												
	Customer:	252	🕄	Custo	mer	Company	Mrs A Te	st					
	Invoice A/c:	10011				Customer A/c: I0011							
	Name:	Mrs A Te	st			Name:		Mrs A Tes	t				
	Address:	Adp Dea	ler Services			Address	:	Adp Deale	r Services	3			
	1 Cygnet Way Hungerford Berkshire		÷	4 .		d							
	Portoodo:	BG17.0	1			Portood		RG17 0YL		-			
	Posicode.		_			FUSICOU	e.			-			
	VAT number:					VATinun	nber:						

Evolving the Automotive Retail *Experience* CDK Global Holdings (UK) Ltd, Cygnet Way, Charnham Park, Hungerford, Berkshire, United Kingdom, Company No.: 09347879

![](_page_41_Picture_0.jpeg)

# 4.3.3 Contact Management

In Contact Management, the traffic light symbol is displayed on the right side of the customer's surname on the 'Make a call screen' and the 'Review' screen

i:	Contact Ma	anagement - CDK User (kcc) - Sup	port TEST 1 (k	cc/993)					_		×
File	Links T	ools Help									
	Exit	Company	Sustomer Customer	Vehicle	e Global Booking View						
Acti	on list   Mak	e a call Manual Call									
Г	Customer de	etails					Company de	etails			7
	Title/Initials:	02 Mrs 💌 A		Home phone:	0845 3031300	۵	Name:		-		
	First name:	Anne		Work phone:	0845 3031300	۵	Address:		-		
	Sumame:	Test	8	Mobile phone:	07799999999	$\checkmark$					
	Address:	Adp Dealer Services		Another number:		Ø					
		1 Cygnet Way Hungerford		Preferred number:	3 Mobile 👻						
		Berkshire		Email:	ant@any.com		Postcode:				
				Account:	F0001 Forecourt Cash Sales		Main:		0	j	
	Postcode:	RG17 0YL		Best time to call:	Call any time.		Other:		9	I	
	Vehicle deta	ails					Call				-
	Registration:	RJ61NWC		Chassis:	WF0GXXGAJGBM53513		Origin:	Call back			
	Franchise:	Z Non Franchise	-	Registration date:	17/12/2011		Attempts:	1			
	Model:	NONFRANCAR Non Franchise	Car (Used 💌	Account number:	F0001 Forecourt Cash Sales		Reference:	Call back	-		
	Variant:	CAR Please Enter Full Vehicle	Descriptior 👻	Privately owned:	<b>v</b>			TES Test Script			
	Description:	Test Car		MOT due:	17/12/2004			/	ς		
	Service due:	27/11/2013 @	15820		,						
	More										
		_									
L							No.cs	ll made			

#### 4.3.4 Showroom

In Showroom, the traffic light symbol is displayed on the right side of the name line in the *Customer details* section of the *Showroom Enquiries - Cash Estimate for ...* form.

💼 Showroom Enquiries - Cash Estin	mate for Mrs A Te	st - Support TEST 1 (kcc/993)							_		×
File Edit Demonstrators View	Tools Help										
Save Email Print Case	fil Custo	Clear c Qualifica Finance	Trade-In	Vehicle	Que 🗸	Summa Present	Rook d	Back Of	اللہ Exclude	Take	È e de
	Vehicle details					Basic details					
CDK Clobal Autoline	Description: Colour: Doors: Engine: Stock: Status:	Vehicles Coupe 2.5 tD to be chosen \ 2 2507 cc n/a Memorandum				List price: Options VAccessories: On The Road: Total excl. VAT: VAT: Total purchase price: Trade-in allowance: Total equity:				4	0.00 155.00 0.00 155.00 70.00 525.00 0.00 0.00
	Customer details Name: Address: Postcode:	Mrs A Test Adp Dealer Services 1 Cygnet Way Hungeford Berkshire RG17 0YL			₩	Amount to pay:					;25.00

![](_page_42_Picture_0.jpeg)

# 4.3.5 Sales Ledger

In Sales Ledger, the traffic light symbol is displayed on the right side of the *Short name* in the *Main details* tab of the *Display Customer Account Details* form.

ccount: 🖣 🛛	2103280 🕨	Short name:	< CONRADT		Telephone number	:
ACOS ac.: 0	023303729					
details Other	details   Financial   Transacti	ons Payment	s Movements Hi	story Text		
details Other	details   <u>F</u> inancial   <u>T</u> ransacti	ons   <u>P</u> ayment:	s   <u>M</u> ovements   <u>H</u> i	story   <u>T</u> ext		
details Other	details   <u>F</u> inancial   <u>T</u> ransact	ons   <u>P</u> ayment	s   <u>M</u> ovements   <u>H</u> i	story   <u>T</u> ext		
details Other	details   <u>Fi</u> nancial   <u>T</u> ransact	ons   <u>P</u> ayment:	s [ <u>M</u> ovements   <u>H</u> i	story   <u>T</u> ext		

![](_page_43_Picture_0.jpeg)

# 4.4 Case file

Information related to any DPAs that have been created for a customer or company will be added to the case file so that a user is made aware that one more DPAs exists for the customer or company when he accesses the customer or company record.

💼 CDK User's C	RM - Support TEST 1 (kcc/993)	- 🗆 X
File Reports T	Fools Customer options Contact details Telephony Help	
Exit Oper	) 🖆 🗹 🔚 🎉 🧲 🏠 🎲 🎼 🎲 🎼 🦛 🎲 🎼 🌆 🎲 🎼 🎼 🎲 🎼 🎼 🎲 🎼 🎲 🎼 🎼 🎼 🎲 🎼 🎼 🎼 🎲 🎼 🎼 🎼 🎲 🎼 🎼 🎼 🎼 🎼 🎼 🎼 🎼 🎼 🎼 🎼 🎼 🎼	Auto Io Show ca
CRM Shortcuts	Find record: 252 🚯 Mrs Test	
My Shortcuts	Summary Customer   Additional Details   Associated vehicles   CRM documents   Data protection	
	Communication	
2	Home phone: 🚳 Mobile phone: 🧶 😓	
My CRM	Work 🗑 Mrs A Test - 🗌 🗙	
Company	Work         Contai         Image: Contact of the second se	ding followup Attach g telephone call
: Customer	22/0 1 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	
<b>2</b>		
Vehicle	Vehici Regie Ru61	Mileage tersales, Driver 3320
	Super Select line for more detail.	

If a DPA has been created then the new option '*Data protection agreements*' will be added in the customer or company case file.

If only one DPA exists for the customer or company this node will be displayed expanded and shows the DPA with the associated traffic light symbol.

If more than one DPA exists the option is collapsed and the number of DPAs is indicated in the text of the option.

If the user clicks the + then the DPAs will be displayed. The user can click on the specific traffic light to be taken to the DPA tab with the relevant agreement loaded

If the setting '*Activate location based agreements*' has been set then the branch of an agreement is shown is the case file. Also, the default agreement(s) are indicated.

Data protection agreements (4)	
MB DP Statement LO - Branch: 10 (Default) - Use: Customer - Status: Partially agreed	
MB DP Statement LO - Branch: 11 (Default) - Use: Customer - Status: Agreed	
Stmnt Dealer A - Branch: 10 - Use: Customer - Status: Denied	
Strint Dealer A - Branch: 11 - Use: Customer - Status: Agreed	

![](_page_44_Picture_0.jpeg)

# 4.5 Campaigns

Within the campaigns tool in CRM there is a new ellipsis(...) where one statement can be selected for the basis of a campaign.

The user clicks the ellipsis of the field 'Based on' to display the list of existing statements.

CRM Ca	mpaign -	Support <sup>·</sup>	FEST 1 (kcc/9	93)										-	×
e Edit :	Selection	Tools	Help												
Exit	New	<b>P</b> Open	Reload	Close	<b>Save</b>	کی Letters	Eabels	📢 Test print	Delet	e Proces	Advanced	Reports	- Pelp		
ain Letter	Selection	Custom	ers   Ignored ci	ustomers											
Campaig	n details						Selection								
Summar	y: S	ales offer	campaign				Branch:		!!!	All Branches		•			
Short na	ame: S	ALESOF					On behalf	f of:	S	Vehicle sales		•			
Descript	ion:	ales offer			~		Based on	c							
										Select a data	protection sta	tement			
					$\sim$				Iqnore	if already conta	cted				
Owner:	ŀ	(CC	CDK	User			-Contact de	etails							
Campaig	n type: 🛙	- 1	.etter		-		Contrati		SHO	Showroom visi		-			
KPrint fo	m: F	PMLETT	ER[V01]				Contact.		Jone						

The user selects a statement with a left-click in the '*Select*' column and a click on the '*Check*' button. Only one statement can be the base for running a campaign.

💼 CRM C	Campaign - S	Support TEST	1 (kcc/9	93)									_	$\times$
File Edit	Selection	Tools Hel	р											
Exit	New	Open (	Reload	Close	<b>L</b> Save	्रू Test E-mail	X Delete	Process A	dvanced	Report	ts Help	þ		
Main E-Ma	ail   Selection	Customers	Ignored ci	ustomers										1
Campa	ign deta 💼	Select a state	ment						-		×			
Summ	nary: File	Help									-			
Short	name: 🛃		?								-			
Descr	iption:	se Check	нер											
		-Select a state	ment											
		Manufacture	r Country	Version St	tatement descrip	tion	From	То	Use	Select				
Owne	r:	00	IGB	1.0 Sa	ales Agreement		01/01/2017	01/01/2019	P	^				
Camp	aign turu	00	GP	9 0	EM Statement		22/02/2019		P					
I Campi	aigirtyp	00	GB	1.0 St	en Test Stateme	nt	01/01/2018	21/03/2018	P	_	-			
		00	GB	1.0 R	eg Sales/Aftersa	les Statement	01/01/2018	11	P	~				
		<								>				

If the parameter '*Activate location based agreements*' has been turned on then only statements permissible for the defined locations are available.

![](_page_45_Picture_0.jpeg)

After selecting a statement as a base for the current campaign, the campaign can be processed clicking the *Process* button.

💼 CRM Campaign - Support TEST 1 (kcc/993	)		-	×
File Edit Selection Tools Help				
Exit New Open Reload	Close Save Letters Labels 7	Test print Delete Process Advanced Reports Help		
Main Letter Selection Customers Ignored cust	tomers			
Campaign details Summary: Sales offer campaign Short name: SALESOFF Description: Sales offer	Branch: On behalf of Based on:	f: Vehicle sales  Sales Agreement(P) Include all customers Include all customers		
Owner: kcc CDK U Campaign type: L Letter KPrint form: KPMLETTER[V01]	Contact deta	SHO Showroom visit		

During the processing of a campaign, for every user, first the existence of DPAs is checked. The program takes the selected statement and looks to see if it is used as a base of one of the user's agreements.

If such an agreement is found the program checks the corresponding communication channel.

The parameter '*Link a campaign type*' on channel level is used to identify the communication channel which contains the consent or denial to a campaign.

Link to a <u>c</u> ampaign type:	U	Letter	•
Link to a letter code:	N	None	
Brik to a jetter code.	L	Letter	.lbr
Link to a marketing activity:	E	E-mail	

If the user had agreed to this channel, it is included in the campaign and is displayed on the *'Customers'* tab.

If not, it will appear on the 'Ignored customers tab'.

The value of the parameter '*Include cases without an agreement?*' substantially affects the number of customers which will be included in a campaign. The default of this parameter is blank, i.e. do not include customers or companies without DPA in campaigns.

Include cases	without an	agreement ?:	
---------------	------------	--------------	--

In the following examples there are seven customers: three agreed to be contacted, one denied. The three other didn't sign a DPA.

Parameter Include cases without an agreement?- default

The customers who explicitly agreed to this communication channel can be found in the *Customers* tab.

The customer who didn't give their consent and the customers who do not have a DPA or their status is unknown appear in the *Ignored customers* tab

![](_page_46_Picture_0.jpeg)

💼 CRM Ca	ampaign - S	Support (	Company 02	(kcc/993)										-	×
File Edit	Selection	Tools	Help												
57	1	Ph	5	6		4	***** <sup>86</sup>	<b>a</b>	×		▶ -	4	2		
Exit	New	Open	Reload	Close	Save	Letters	Labels	Test print	Delete	Process	Advanced	Reports	Help		
Main   Letter	Selection	Custome	ers   Ignored o	customers											
Number	Name			Address				Reason							
1	Mr J Bond			24 Stonebrid	dge Way, Te	elford, Shrops	hire, TF3 7H	HG The use	did not agre	e to the curre	nt campaign t	уре			
2	Mr F Single	ton		3 George St	reet, Hunge	rford, Berks,	RG	The use	did not agre	e to the curre	nt campaign t	ype			
3	Mr J Symes	;		2 The Block	. Telford, SI	nropshire		The use	did not agre	e to the curre	nt campaign t	vpe			
4	Mr R Cook			24 Meridian	Road, Hune	erford. West	Berkshire, F	RG125 The use	did not agre	e to the curre	nt campaign t	vpe			
5	Mr J Taylor			34 Station F	Road, Heath	Green. Telfo	rd. Shropshi	re. TF4The use	did not agre	e to the curre	nt campaign t	vpe			
6	Mr.J Clavel	1		54 James B	oad Newbi	rv Berks BC	21 40T	The use	did not agre	e to the curre	nt campaign t	vpe			
7	Miss A Wa	lace		23 The Terr	ace Sutton	Surrey		The use	did not agre	e to the curre	nt campaign t	vne			
8	Mr.   Callan	han		121 Diamon	d Avenue	Shifnal Telfor	d Shronshir	e Theuse	did not agre	e to the curre	nt campaign t	vne			
9	Mrs M Gran	nger		42 Longford	Place, Bart	ford Green, S	trathclyde, (	G21 6F The use	did not agre	e to the curre	nt campaign t	ype			

This is the safe way to contact only customers who gave the dealer their explicit consent

• Parameter Include cases without an agreement?- ticked

Not only the customers who agreed to this communication channel but also the customers with an unclear status can be found now in the *Customers* tab and will be contacted.

Only customers who had denied the communication channel appear in the *Ignored customers* tab

CRM (	Campaign - S	Support (	Company 02	(kcc/993)										-		×
File Edit	Selection	Tools	Help													
Exit	New	Open (	Reload	Close	<b>L</b> Save	Letters	EE ** Labels	्रू Test print	X Delete	Process	Advanced	Reports	? Help			
Main   Lett	er Selection	Custome	ers   Ignored o	customers												
Numbe	Name			Address				Reason								- I
1	Mr J Bond			24 Stonebri	dge Way, Te	lford, Shrops	hire, TF3 7H	IG The use	r did not agre	ee to the curre	nt campaign t	vpe				<u>,</u>
2	Mr F Single	eton		3 George St	treet, Hunge	ford, Berks,	RG	The use	r did not agre	ee to the curre	nt campaign t	ype			_	
3	Mr J Syme:	s		2 The Block	c, Telford, Sł	nropshire		The use	r did not agre	ee to the curre	nt campaign t	ype				
4	Mr R Cook			24 Meridian	Road, Hung	erford, West	Berkshire, F	RG125 The use	r did not agre	ee to the curre	nt campaign t	ype				
5	Mr J Taylor	r		34 Station F	Road, Heath	Green, Telfo	rd, Shropshi	re, TF4The use	r did not agre	ee to the curre	nt campaign t	ype				
6	Mr J Clave			54 James R	load, Newbu	ry, Berks, RO	G21 4QT	The use	r did not agre	ee to the curre	nt campaign t	ype				
7	Miss A Wa	llace		23 The Terr	ace, Sutton	Surrey		The use	r did not agre	ee to the curre	nt campaign t	ype				
8	Mr J Callag	han		121 Diamon	nd Avenue, S	Shifnal, Telfor	d, Shropshin	e The use	r did not agre	ee to the curre	nt campaign t	ype				
9	Mrs M Gra	nger		42 Longford	I Place, Bart	ord Green, S	trathclyde, 0	G21 6F The use	r did not agre	ee to the curre	nt campaign t	уре				

*Note:* Before using this parameter setting please think about the consequences.

![](_page_47_Picture_0.jpeg)

# 4.6 Letter writer

The letter writer already observes the existing privacy settings. Once this product is installed, however, users will first be prompted to confirm the basis of the letter.

![](_page_47_Picture_4.jpeg)

The user will be expected to select *Yes or No (Default is No)*. If the user selects *No* then the existing privacy settings will be used. If the user selects *Yes* then they will be prompted to select which DPA or DPAs should be considered. In case that there exists only one DPA for the current customer, this is selected automatically.

The user selects an agreement with a left-click in the '*Select* 'column and a click on the '*Check*' button. Only one agreement can be the base for writing a letter.

If the parameter '*Activate location based agreements*' has been turned on, then checks will only be made against those agreements relevant to the user's permissible locations. The user's permissible locations will be derived from the GB user record.

Before a letter is written the communication channels of the agreement are checked. First the letter code of the current letter is compared with the letter code of the channels and if there is a match the channel will be used.

The parameter '*Link a letter code*' on channel level is used to identify the communication channel which contains the consent or denial to receiving a letter. The specific characteristic of this parameter is described in paragraph <u>Description of channel details</u>

Link to a letter code:	A	Letters to both address 👻				
Link to a <u>m</u> arketing activity:	N 2 3	None Letters to home address				
Add a method to the current channel	A	Letters to both addresses				
Method description	4	Telephone dh				
Mth Phone	- 5	E-mail —				
Mth SMS	č	E-mail and SMS				

If the user had agreed to this channel, the letter template pops up and the letter can be finished.

![](_page_48_Picture_0.jpeg)

If not, the following message will appear.

Letter Writ	er	×
	Customer Test, Anne (00000252) did not consent to channel 'MOT/Service Reminders - POST' in the data protection agreement. The customer did not agree to receive this letter.	
	ОК	

# 4.7 Marketing activities

From several places within the CRM module, the user can start both day-to-day and marketing contacts to a customer or a company. If a marketing activity should be performed the data protection agreement of the customer or company will be checked.

Marketing activities can be started from the *Summary* tab of the CRM module and from the *Customer details* tab of CRM Contact (see the red lined icon below).

<u>-l</u> ome phone:	018768319		Mobile phone:	017544556677	🔹 🧶 🕏
<u>W</u> ork phone:		<b>—</b>	<u>F</u> ax:		- 6
Vork extension:			Fmail	p maier@acb de	

Summary tab of the CRM main program

Home phone:	018768319	Address:	Hohle Gasse 44 Bonn	
<u>N</u> ork:			Don't	
Extension::				
<u>1</u> obile:	017544556677	 Postcode:	51777	
ax:		Company:	Maier's Studio	
mail	p.maier@acb.de	Position:		

Customer details tab of CRM Contact

![](_page_49_Picture_0.jpeg)

If the user clicks on one of the icons they will be prompted with the following question:

![](_page_49_Picture_3.jpeg)

The user will be expected to select Yes or No (Default is No).

If the user selects No then the existing privacy settings will be used.

If the user selects Yes then they will be prompted to select which DPA should be considered (a separate prompt screen appears only if the customer or the company has more than one DPA. Otherwise, the single DPA is the basis of the check).

Before a contact is allowed, the communication channels of the current agreement are checked. First, the marketing activity code of the current activity is compared with the marketing activity code of the channels and if there is a match the status of the channel will be used.

'Parameter *Link to a marketing activity*' on channel level is used to identify the communication channel which contains the consent or denial of a marketing activity. The specific characteristic of this parameter are described in paragraph <u>Description of channel details</u>

Link to a marketing activity:	N	None	-
Add a method to the current channel	N	None	0
Add a method to the current channel	T	Telephone s	m
Method description	-E	E-mail GMC	-
Mth Phone	-J C	E-mail and SMS	1
Mth SMS	F	Fax	

If the user had agreed to this channel, the user can perform his activity.

If not, the following message will appear.

CRM		×
	Customer Test, Anne (00000252) did not consent to channel 'MOT/Service Reminders - SMS' in the data protection agreement. The customer did not agree to receive this marketing activity.	
	ОК	

Evolving the Automotive Retail Experience

CDK Global Holdings (UK) Ltd, Cygnet Way, Charnham Park, Hungerford, Berkshire, United Kingdom, Company No.: 09347879

![](_page_50_Picture_0.jpeg)

### 4.8 Deduplication utility

Within CRM, there is a deduplication tool. The user can select a company, customer or vehicle record amongst a number of similar records. They define can one *Master* record and one to several *Merge* records and mark the information in the merge records which will be copied into the master record. This allows the user to improve the quality of the CRM database by reducing the number of records and collating all information into one reliable place.

This is also relevant for DPAs on company or customer records.

You can access the Deduplication utility by going to:

- ➤ CRM
- Reports& Enquiries
- > Database cleansing
- > Deduplication utility

**NOTE**: care should be taken with your criteria as no more than 3 criteria options are recommended as this can impact system performance

After opening this tool the user decides which of the similar records for customer with the surname 'Holt' as shown in the example below) should be marked as *Master* and which as *Merge* record. The master record will remain in the database and the merge record will be deleted after the deduplication process is finished.

In the screen, you will see the details of the master record, a grid of merge records (in the following example, only one) and the details of the current merge record.

💼 Database Cleansing	: Step 2 of 4 - Custon	ner record confirmation	on		- 🗆 X
Master record details:- Magic number: Customer name: Address: Restore Master CRM	ZE       Mr S Holt       Flat 6 The Rise       Hollinswood       Telford       Postcode:	TF3 7TE	Branch: Company: Home: Work: Fax: Mobile: Email:	TEL     Telford       0	Cancel
Records to merge: Magic Name 77 Mr S Holt		Address Flat 6,The Rise,Hollis	wood, Telford		
- Selected record details Magic number: Customer name: Address:	77 Mr S Holt Rat 6 The Rise Holliswood Telford		Branch: Company: Home: Work: Fax:	TEL         Telford           0	Ŀ
CRM	, Postcode:	,	Mobile: Email:		DPAs >

![](_page_51_Picture_0.jpeg)

Because one of the selected records holds a DPA you will see this button on the right hand side near the bottom of the form.

![](_page_51_Picture_3.jpeg)

If you click this button the '*Database Cleansing: Data Protection Agreements*' dialogue opens. The *Next* button is greyed out until the user has made a selection of a data protection agreement.

j Database	Cleansing: Data Prot	ection Agree	ement	ts					-	_	
le Help	þ										
		2									
Close	Save selection	Heln									
CIOSE	Juve selection	i i cip									
ciose	Save selection	ricip									
Select the ad	greement(s) belonging t	o one record t	o merc	ge							
Select the ag	greement(s) belonging t	o one record t	o merg	ge							
Select the ag	greement(s) belonging t	o one record t	o merg	ge Use	Description	Df	Last updated	Channels		Select?	
Select the ages Status Magi	greement(s) belonging t	o one record t	o merg Mfr U 00	ge Use P	Description Dealer Statement	Df	Last updated	Channels		Select?	

In this dialogue, the user finds a list of customers or companies with their corresponding DPAs.

#### Description of the columns of the Select the agreement(s) ... grid

- **Status** This is the current status of the record in the deduplication utility. Values: *Master* or *Merge*
- Magic The CRM magic number of the company or customer
- Name The name of the CRM company or customer
- *Mfr* The manufacturer the agreement is valid for. Value '---' no agreement found
- Use Use of the agreement. Values: Commercial (company) or Personal (customer).
   Value '-' no agreement found
- Description Description of the agreement. Value 'No Agreement found' no agreement found
- Dft A tick in this column indicates the default agreement of the current company or customer
- Last updated The date of the last updated of the current agreement.
- Channels A click into this cell opens a dropdown containing the descriptions of all channels of the agreement
- Select? A tick in this column marks the selection of an agreement (or agreements) of a company or a customer. The content of the selection either remains with the master record or will be copied to the master record

*Note:* - In the 'Select?' Column, the master record is indicated with a tick as default selection. Only all agreements of a company or a customer can be selected. In the example above a tick into a line with magic number 1257 would select all three lines.

![](_page_52_Picture_0.jpeg)

To go on with the deduplication process the user has to take a selection and click the 'Save selection' button. Then they return to the '*Database Cleansing: Step 2 of 4* form'. Here the *Next* button is now enabled and the user can continue.

# 4.9 MS routines for use in Report Generators and data extracts

There will be many reports and extracts on dealer systems (some standard Autoline and some dealer-defined) that currently make use of the existing customer and company privacy settings to determine whether or not communication should be permitted.

Once this product has been installed, however, dealers will need to distinguish between dayto-day business communication that forms part of their duty of care and marketing-based communication. For their day-to-day business communication, the existing customer and company privacy settings are sufficient to determine whether communication is permissible or not. For any marketing related communication, however, the relevant DPAs of the customer or company need to be considered to determine whether or not communication is permissible.

Each report that you wish to read the GDPR channels will need to have the following logic added to them:

💼 Repo	ort Generator	r - (New report) - Support Company 07 (kcc/995)	_ 🗆 🗙
File Edi	lit Tools Lan	guage Window Help	
Exit	New Open	Save Last Wizard Copy Paste Check Run Help	
N	Name	F	
F	PHONE\$	MS_X4DPA_Get_Channel_Status\$("QUERYNAME","CHANNELQUERY","T",SYM(mk_targt\$)," ",FALSE)	
E	EMAIL\$	"MS_X4DPA_Get_Channel_Status\$("QUERYNAME","CHANNELQUERY","T",SYM(mk_targt\$)," ",FALSE)	
9	SMS\$	"MS_X4DPA_Get_Channel_Status\$("QUERYNAME","CHANNELQUERY","T",SYM(mk_targt\$)," ",FALSE)	
F	POST\$	"MS_X4DPA_Get_Channel_Status\$("QUERYNAME","CHANNELQUERY","T",SYM(mk_targt\$)," ",FALSE)	
			_
			_
			_
			_

The "QUERYNAME" parameter is taken from the **Statement** which can be located via:

- Select Manufacturing systems company X4 from the Master menu
- Select Generic CRM parameters from the Manufacturer systems menu
- Select CRM parameters
- Select Data protection parameters
- Select the relevant CRM company
- Select the Statements tab

![](_page_53_Picture_0.jpeg)

In this example the **Query** field is set to "**DPA01**" so this will need to replace "QUERYNAME" on the derived field:

िंह्य CRM add-ons parameter configuration utility - CRM add-ons ( File Edit Tools Help	(kcc/995)	<u>_     ×</u>
Exit Amend Cancel Save Gridedit Help		
Project parameters	Data protection parameters - Company: MK/07	
Campaign parameters     Gramma CRM parameters     Gramma CRM parameters     Gramma CRM documents	General   Methods   Channels   Statements   Data protection statements	_
CRM notification parameters     CRM notification parameters     Or Shared data company     Of the protection parameters     Of the support Company 02     Of the support Company 03     Of the support Company 04     Of the support Company 05     Of the support Company 06     Of the support Company 08     Of the support Company 09     Of the support Company 09     Of the support Company 09     Of the support Company 10     Of the support Company 09     Of the support Company 10     Of the support Company 11     Of the support Company 11	Statement description       Version Query       CS       MS       From       To         Res_Statement       1.0       INSTATE GB       100       01/05/2018       /       /         Data Protection Agreement       1.0       DPA01       58       00       01/01/2018       /       /         (#) Data Protection Agreement       1.0       DPA01       58       00       01/01/2018       /       /         (#) Data Protection Agreement       1.0       DPA01       58       00       01/01/2018       /       /	
	Release: X4DPA 4.74	11.

The "CHANNELQUERY" parameter is taken from the Channel which can be located via:

- Select Manufacturing systems company X4 from the Master menu
- Select Generic CRM parameters from the Manufacturer systems menu
- Select CRM parameters
- Select Data protection parameters
- Select the relevant **CRM company**
- Select the Channels tab

In this example the **Query** field is set to "**EMAIL**" so this will need to replace "QUERYNAME" on the derived field:

t Amend Cancel Save Grid edit Help			
ject parameters	Data protection parameters -	Company: MK/07	
- S Campaign parameters	General Methods Channels	Statements	
CRM parameters			
CRM addition accompton	Channels		
Child notification parameters	Channel description	Methods	Query
- 00 - Shared data company	Reg Home Phone	Reg Home Phone	RHPHONE
01 - Support TEST 1	Reg Mobile Phone	Reg Mobile Phone	RMOBILE
02 - Support Company 02	Reg SMS	Reg SMS	RSMS
03 - Support Company 03	Reg Email	Reg Email	REMAIL
04 - Support Company 04	Reg Post	Reg Post	RPOST
- 05 - Support Company 05	Home Phone	Home Phone	HOME
- 06 - Support Company 06	Mobile Phone	Mobile Phone	MOBILE
07 - Support Company 07	SMS	SMS	SMS
- 08 - Support Company 08	Email	Email	EMAIL
- 09 - Support Company 09	Post	Post	POST
11 - Support Company 11     X4 - CRM add-ons     General CRM parameters     General Data Protection parameters			
mation			

![](_page_54_Picture_0.jpeg)

Therefore, if we were to add the derived field to look at this Statement and Channel it would need to be set to 'MS\_X4DPA\_Get\_Channel\_Status\$("DPA01","EMAIL","T",SYM(mk\_targt\$)," ",FALSE)

You will also need to add some Selection Criteria to the reports and include this in the Logic. For example, if the **EMAIL\$** derived field is added then this **Selection Criteria** will need to exclude agreements where the GDPR consent status set to **Denied**. This will also need to be included in the **Logic**.

In the example below we have added **!0\_EMAIL\$<>"Denied"** to selection H and added **&H** to the **Logic**:

Tele Report Generator - MOT Reminder (MH7) - Global data (kccgrp/3276)	JX
Exit New Open Save Last Wizard Copy Paste Check Run Help	
Title Tables Format Sequence Derived Prompt Select Update (         Criteria         A         VI/PExstaff: REGNO.smr((0.SOCO6).smr((0.W/IPNO))=0         8       0, INCLUDE-TRUE         C       1, MOTDATE <= 11, NEXTSERV-28 and 11, MOTDATE <= 11_NEXTSERV-28         D       1, STATUS = "C"         E       2, STATUS >> "C"         Z_2_MAGIC > 0       -         G       1AETLOCN = "001"         H       0EMALLS>"Denied"         J       -         Amend       Inset         Delete       Erase         Logic       #:         #:       AABBCADAEAFA_BAH         Then:       © Include	
Selection criteria Selection page	1

Other variables to the above Selection Criteria are "**Unknown**", "**Agreed**" and "**No Agreement**" so depending on the report you could search for specific GDPR consent statuses.

When the report is run it will check the GDPR consent status for the customer record found and either **include or exclude** it from the results.

![](_page_55_Picture_0.jpeg)

# 4.10 Report data

#### Right of portability

The right of portability foresees that an electronic file with his/her personal data should be provided to the customer if required. This can be configured via the following menu:

Note: The Export definition is added as part of the set-up to use C:\temp and scratch after export.

- System Utilities
- Management Menu
- > Export facilities

The code *KG1* has to be configured as per the image below. The field *PCDIR* is the local PC directory where the file is going to be saved, for example C:\Temp

Dispositivo export.	Directorio host	Exportar a PC	Directorio del PC	Formato	Borrar después expor	Dirección navegador
CODE	HOSTDIR	PC	PCDIR	FORMAT	SCRATCH	BROWSE
KG1	/xfer	Y	C:/temp	CSV	N	

After this configuration is complete, we are able to extract end customer data do deliver in an electronic format.

To do this, navigate to:

- ➤ CRM
- > Company
- Reports & enquires
- ➢ GDPR Reports Menu
- > Export customer details

Select the customer by entering the magic number or by searching. The, Select OK.

💼 Export customer details (N	1K) - Dealer 01 (kcc/4074)	—		×
Enter customer magic	2105376		OK	
			Canc	el
			Help	>
			Sched	ule
			Add to b	atch
If Customer magic is equal to	ZERO, all records are exported.			^
				~
,				

![](_page_56_Picture_0.jpeg)

#### Select Export file-to-PC

A .csv file will be created on the configured PC directory. The file will be named the customer's magic number.csv

💼 Export customer detai	ls (MK) - Dealer 01 (kcc/4074)		_		<
Enter customer magic	2105376			ОК	
	💼 Select Ite —	×		Cancel	
				<u>H</u> elp	
	Export-file-to-PC Quit			<u>S</u> chedule	
				Add to batch	۱
If Customer magic is equa	OK Cancel			1	
				~	/

#### **GDPR Customer Log**

It is now possible to report with the detail of each marketing event that are made to a customer or to a company, if required.

To do this, navigate to:

- > CRM
- > Company
- Reports & enquires
- GDPR Reports Menu
- GDPR Customer Log

Select the customer or the company by entering the magic number or search via the ellipse Enter a date period for the report

💼 GDPR customer log - Dealer (	)1 (kcc/4074)	-					
Qutput type: Customer magic(ZERO = NONE) Company magic(ZERO = NONE) Start Date End Date	Display         •           2105376            0            01/02/2018            28/02/2018		OK Cancel Help Schedule				
Either customer or company magic is mandatory to enter.							

A report with the customer personal data activity will be listed

Dog GDPR Clientes	e		and the Contract of State			approach to be	C Basecill's		X
Empr.MK	MK Type (T/C) Id Cliente	Fecha	Hora Evento	ld Regist	Sucur.	Módulo origen	Origen Empresa	Usuar.ld Flujo (Entr./Sal.)	
01			8,00 CAMPAIGN	EMAILGDP				keergg OUT	
01	T 13773	01/03/2018	9,00 CAMPAIGN	EMAILGDP		MK	01	kccrgg OUT	
4									

This report, by default, shows Autoline marketing actions via Campaigns. To capture data that is from rep-gen reports, the following derived fields will need to be added to the reports in order to start to log the extracted information.

![](_page_57_Picture_0.jpeg)

On the derived fields of the report the following function should be added:

IF (FLD(mk\_targt\$.mk\_ta\_magic) <> 0 AND rg\_calc == 1) 'GB\_GDPR\_LogUsageRecord(gb\_coident\$,"T",FLD(mk\_targt\$.mk\_ta\_magic),"REPORTS","XXX X",0,gb\_module\$,gb\_coident\$,FLD(mk\_targt\$.mk\_ta\_branch\$)) ENDIF

The "XXXX" element should be replaced with the module and report, for example, "MK/ABC" - this will write this text to the log file so you can see which report has been run that uses the customer data.

Report Generat	or - Service only reminder letter (K42) -							
ie Luit Tools W								
Exit New Open	F 🔜 🏊 🎉 F - F - V Q ? Save Last Wizard Copy Paste Check Run Help							
Title   Tables   Forma	t Sequence Derived Prompt Select Update							
· ·								
Name	•							
	ki_read_next(rg_handle(4).3.rg_record(4))							
	if ki_status⇔0 or 11_REGNO ⇔ 14_REGNO then break							
	if 14 REGNO=" "then break							
	if 14 DELFLAG = "Y" then continue:10 FOUND=TRUEbreak.wend							
	RFM Boutine tests for existing contact-set contact code as required							
	ov contact exists(12 MAGIC, "W", "K42", 11 MAGIC, 10 J TODAY-30)							
INCLUDE	(GB_RETURNS="OK" ? TRUE : FALSE)							
	REM Routine truncates vehicle description after 2nd blank space							
	Q1\$=!1 DESC : Q1=POS(Q1\$="") : Q2=POS(STR(Q1\$,Q1+1)="") : !1 DESC=STR(Q1\$,Q1+Q2)							
	REM Derived fields defined by MK/libCM for letter format.							
LONGDTES	" ":'do julian("TODAY".10):'do date(do day.sym(l0_LONGDTE\$).0)							
NAME 35\$	mk let name\$							
ADD1 35\$	mk let address\$(1)							
ADD2 35\$	mk let address\$(2)							
ADD3 358	mk let address\$(3)							
ADD4_358	mk let address\$(4)							
ADD5_358	mk let address\$(5)							
POSTCDES	mk let postcode\$							
SXTITLES	mk let title\$							
EXECNAMS	mk let severs							
SXPHONES	mk let phone\$							
	END DO							
	IF (FLD/mk_tarct\$mk_ta_magic) ⇔ 0 AND rg_calc == 1)							
	(3B GDPR LogUsageRecord(dp coidents "T" FLD(mk targtsmk ta magic) "REPORTS" "MK/K42" 0.gb modules.gb coidents FLD(mk targtsmk ta branchs))							
	ENDIF							
1								
	Amend Inset Delete Erase							
	Derived field page							

With this function added to the original report we can log extraction, and when the *GDPR Customer Log Report* is run, campaign and rep-gen report data information will be extracted.

![](_page_58_Picture_0.jpeg)

# 4.11 Consolidation routine

A consolidation routine can be found in

- Manufacturing Systems
- > X4CRM Add-ons menu
- Consolidate X4 files

This requires priority 7 access in MS X4

This routine can be processed manually or in timed-operations.

ile <u>H</u> elp	×	ର	
Exit	Consolidate	Help	
his will r	emove all record	ds from CRM docume	ents table where the
orrespon	ding records in	the core system tabl	e do no longer exist.

This program is a collection of consolidation routines of all Generic CRM add-ons. One of these deletes all data protection agreements and their corresponding channel statuses if the customer or the company no longer exists in the CRM main files (MK.targt and MK.compy)

As long as there is no entry in timed-operations, the following message appears:

![](_page_58_Picture_12.jpeg)

To add the entry to timed-operations navigate to:

- System utilities
- > Timed operations
- Configure Schedule
- > Module MS
- ➢ MSX4EOD

Add as required, daily or weekly

**NOTE**: This must be added for Company number X4 only

![](_page_59_Picture_0.jpeg)

		VV PUE-ALDADDE VD			- 11 F		T DECICN	DACELAVOUT	DECEDENCE	-	MAILING	
💼 Tim	ed Operation	s Schedule - Support System Re	v 8.30 (kcc/990)							-		$\times$
-Modu Mod	lle for available dule: MS	options Manufacturer systems					Scheduled option	ns by frequency C Daily C Yearby	C Weekly		C All from no	ow hr
							· · Monany	· really	· nequear		· roudy on	<i>y</i>
Modul	e Option	Description	Ex Freq			Time Mod Option Descr	ription				Co Ex Fre	a Link
MS	MSMBEKS	EKS Interface	N D	~								1
MS	MSMBEMO	Sales transactions for MOPAR	N D									
MS	MSMBIPL	Import purchase invoice data	N D									
MS	MSMBKASK	Kaskade	N D									
MS	MSMBLIM	Logisticbus order file import	N D									
MS	MSMBMCV	Convert MCC Vin numbers	N D									
MS	MSMBMKE	Marketing research file export	N D									
MS	MSMBNAP	National Car Check	N D									
MS	MSMBNAT	National Parts Availability	N D			1						
MS	MSMBPCE	Export to Giove	N D		Add>							
MS	MSMBPCI	Import from Giove	N D			-						
MS	MSMBPLA	Calculate parts retail-prices	N D			1						
MS	MSMBSUP	Supersession Creation	N D		< Remove							
MS	MSMBUPLP	Upload Pricefile	N D									
MS	MSMBUVR	Used Vehicle Reports	N D									
MS	MSMBVCN	Upload received VEGA credits	N D									
MS	MSMBVSG	Used Vehicle Graphs	N D									
MS	MSMBVTF	Vega transmission procedure	N D									
MS	MSPERDMN	Persistent daemon controller	N D									
MS	MSTSTRWL	Trawl system menus	N D									
MS	MSX2EOD	Consolidate X2 Files	N D									
MS	IMSX4EOD	Consolidate X4 files	IN ID									
MS	OIMSY002	Logfile viewer	N D									
MS	OIMSY003	Log and system maintenance	N D									

💼 Scheduling informa	ation			Х
Module identifier:	MS Manufacturer systems	Menu name:	X4MEN	
Description:	Consolidate X4 files	Operation code:	MSX4EOD	
Timing   Flags   Reports	5			
Company number:	X4 X4. CRM add-ons	<b>_</b>		
Frequency:	D Daily 💌	One-off run date:	//	
When to run:		Time:	23.00	

![](_page_60_Picture_0.jpeg)

# 4.12 Glossary

Term	Acronym	Description
Data protection statement	DPS	A statement that details what personal
		information will be collected and how this
		information will be used.
Data protection agreement	DPA	A record of a customer's agreement or non-
		agreement to the terms of a privacy
		statement
Channel of communication	na	A defined category of communication
		methods, e.g. Electronic
Method of communication	na	A specific method of communication within
		a channel of communication. For example,
		e-mail and SMS might be methods of
		communication within the Electronic
		channel of communication.