
PINNACLE

PROFESSIONAL

UPDATE RELEASE NOTES

18.2

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GDPR Enhancements



18.2

Contents

GDPR Enhancements

New to Pinnacle for the 18.2 release is the creation of tools to allow users to have the ability to administrate customer information to meet GDPR Compliance obligations.

1. Ability to identify customer data as Business or Individual.
2. Record and identify GDPR permission status
3. Identify hidden records
4. Ability to remove customer data if they request to be forgotten
5. Ability to anonymise account data in bulk
6. Date stamp GDPR status granted.

What is GDPR?

GDPR is a new European legislation that governs the use of personal data within the European Union. Although not a requirement in Australia at this time. If you are handling any customer information from European countries it is advised that you comply with this legislation for those individuals.

18.2 Build Release Notes

Updating GDPR preferences can be done in two new methods within Pinnacle Professional 18.2

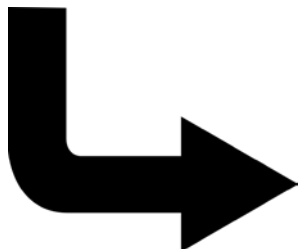
Method 1 - Maintain GDPR Screen

There is a dedicated tool that will allow users to update clients individually or in bulk.

To access this follow these steps:

1. Click Management
2. Utilites
3. GDPR
4. Maintain GDPR

The screen to the right is what will be shown.



Name	Individual	GDPR	Hidden
ACTUAL SYSTEMS	<input type="checkbox"/>		<input checked="" type="checkbox"/>
DAVE	<input checked="" type="checkbox"/>	13/11	<input checked="" type="checkbox"/>
BILL	<input type="checkbox"/>		<input checked="" type="checkbox"/>
SG SILVER GARAGES	<input type="checkbox"/>		<input type="checkbox"/>
JW CARS	<input type="checkbox"/>		<input type="checkbox"/>
JOHN BOOTH	<input type="checkbox"/>		<input checked="" type="checkbox"/>
GEOFF RICHARDS	<input type="checkbox"/>		<input type="checkbox"/>
UNKNOWN	<input type="checkbox"/>		<input type="checkbox"/>
MALCOLM TREW	<input type="checkbox"/>		<input type="checkbox"/>
JASON	<input type="checkbox"/>		<input type="checkbox"/>
RITCHY UNIVERSAL GARAGE	<input type="checkbox"/>		<input type="checkbox"/>
ALITOGAS	<input type="checkbox"/>		<input type="checkbox"/>
HIERON HOUSE CAR SALES	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>
BOB WILSON CAR SALES	<input type="checkbox"/>		<input type="checkbox"/>
HEADS OF THE VALLEY SALVAGE	<input type="checkbox"/>		<input type="checkbox"/>
UNKNOWN	<input type="checkbox"/>		<input type="checkbox"/>
GOODLIFE SPARES	<input checked="" type="checkbox"/>		<input type="checkbox"/>
VW THOMAS	<input type="checkbox"/>		<input type="checkbox"/>
BABBAGES	<input type="checkbox"/>		<input type="checkbox"/>
UNKNOWN	<input checked="" type="checkbox"/>		<input type="checkbox"/>
CARDIFF COMMERCIALS	<input type="checkbox"/>		<input type="checkbox"/>
TRUSTWORTHY MOTORS	<input type="checkbox"/>		<input checked="" type="checkbox"/>
CITY MOTOR SERVICES	<input type="checkbox"/>		<input type="checkbox"/>
AH MOTORS	<input type="checkbox"/>		<input type="checkbox"/>
GWENT HATCHBACKS	<input type="checkbox"/>		<input type="checkbox"/>
GEAR BOX CENTRE	<input type="checkbox"/>		<input type="checkbox"/>

From this screen you can do the following:

- Filter between if customer is a business or an Individual
- Filter if GDPR Permission has been given
- Filter if the Data is hidden
- Set if a client is an individual or not by checking the box next to the client name
- Set if the client is to be hidden or not by checking the box next to the client in the hidden column

From this screen you can bulk highlight if you need to Anonymise any customer information, Including Invoices.

1. First highlight all customers you want to Anonymise
2. Then go to Operations Tab then Anonymise
3. If GDPR has a date only invoices before that date will be Anonymised

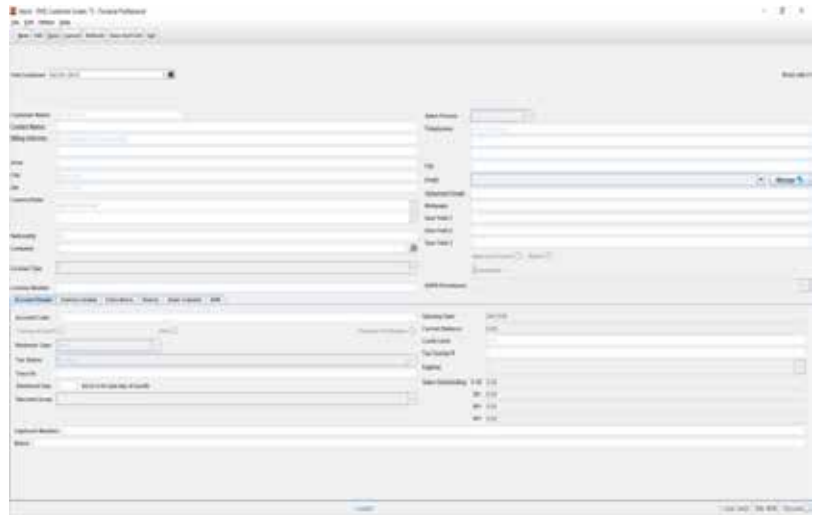
18.2 Build Release Notes

Method 2 - Via Customer Screen

GDPR Administration can also be completed on the customer screen

From here you have following Options:

- Hide Account Information by checking the Hidden checkbox
- Mark account as an individual rather than a company by checking the individual check box
- Set Date GDPR Permission was granted
- Anonymise account so no Personal details are stored.



How to access and anonymise customer account data.

From the customer screen within Pinnacle 18.2 select (Utilities > Anonymise)

To confirm Personally Identifiable Information has been removed populated fields within a customers account will be replaced with "ZZZ". As Illustrated in the before and after screenshots below:

Before

A screenshot of the Pinnacle Professional software interface showing the 'Customer Screen' before anonymisation. The window title is 'Kevin - Pinnacle Professional'. The interface includes a menu bar (File, Edit, Utilities, Help) and a toolbar (New, Edit, Save, Cancel, Refresh, Save And Exit, Exit). The main area is divided into several sections: 'Find Customer' with a search box, 'Customer Name' (KEVIN GRAY), 'Sales Person', 'Contact Name', 'Billing Address' (10 Earlshead Crossway South), 'Area', 'City' (Edinburgh), 'Zip' (EH11 4EP), 'Country/State' (UNITED KINGDOM), 'Nationality' (UK), 'Company', 'License Type', 'License Number', 'Account Details' (Account Code: 25, Opening Date: 26/11/18, Current Balance: 0.00, Credit Limit: 0.00, Business Type: Yard, Tax Status: Taxable, Tax Exempt #, Expires), 'Delivery Details', 'Extra Notes', 'History', 'Bank Transfer', and 'ARN'. There are also checkboxes for 'Approved Vendor', 'Hidden', and 'Individual', and a 'GDPR Permission' dropdown.

After

A screenshot of the Pinnacle Professional software interface showing the 'Customer Screen' after anonymisation. The window title is 'Kevin - Pinnacle Professional'. The interface includes a menu bar (File, Edit, Utilities, Help) and a toolbar (New, Edit, Save, Cancel, Refresh, Save And Exit, Exit). The main area is divided into several sections: 'Find Customer' with a search box, 'Customer Name' (KEVIN GRAY), 'Sales Person', 'Contact Name' (ZZZ), 'Billing Address' (ZZZ), 'Area' (ZZZ), 'City' (ZZZ), 'Zip' (ZZZ), 'Country/State' (UNITED KINGDOM), 'Nationality', 'Company', 'License Type', 'License Number', 'Account Details' (Account Code: , Opening Date: 26/11/18, Current Balance: 0.00, Credit Limit: 0.00, Business Type: Yard, Tax Status: Taxable, Tax Exempt #, Expires), 'Delivery Details', 'Extra Notes', 'History', 'Bank Transfer', and 'ARN'. There are also checkboxes for 'Approved Vendor', 'Hidden', and 'Individual', and a 'GDPR Permission' dropdown. Red boxes highlight the 'Contact Name', 'Billing Address', 'Area', 'City', 'Zip', and 'Statement Email' fields, which have been replaced with 'ZZZ'.

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