PINNACLE Professional

18.2

UPDATE RELEASE NOTES

GDPR Enhancements

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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

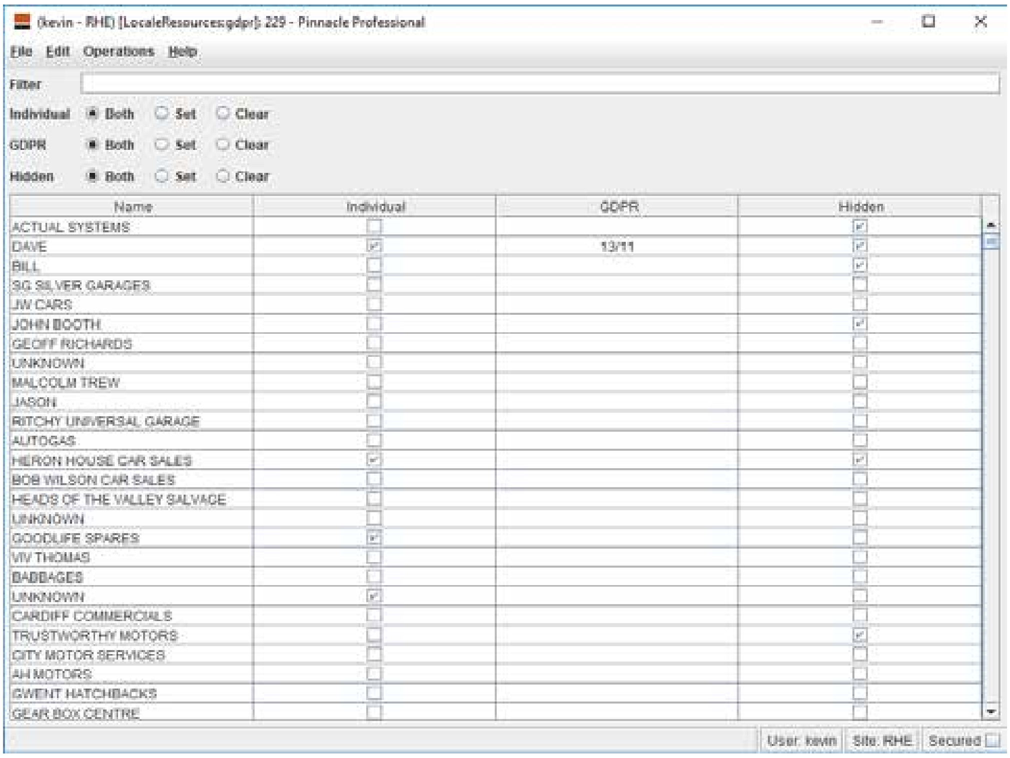
Method 1 - Maintain GDPR Screen

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. Utilitites
3. GDPR
4. Maintain GDPR

The screen to the right is what will be shown.



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 indvidual 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

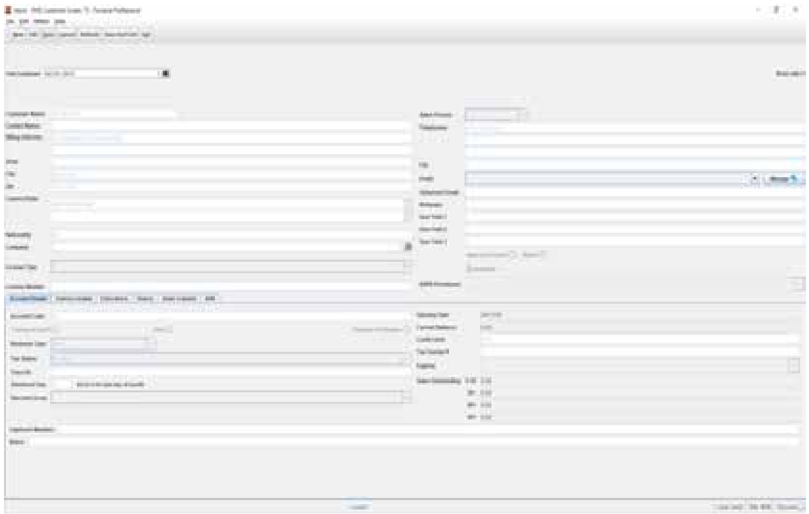
From this screen you can bulk highlight if you need to Anonymise any customer information, Including Invoices.

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

Method 2 - Via Customer Screen

GDPR Administration can also be completed on the customer screen

From here you have following Options:



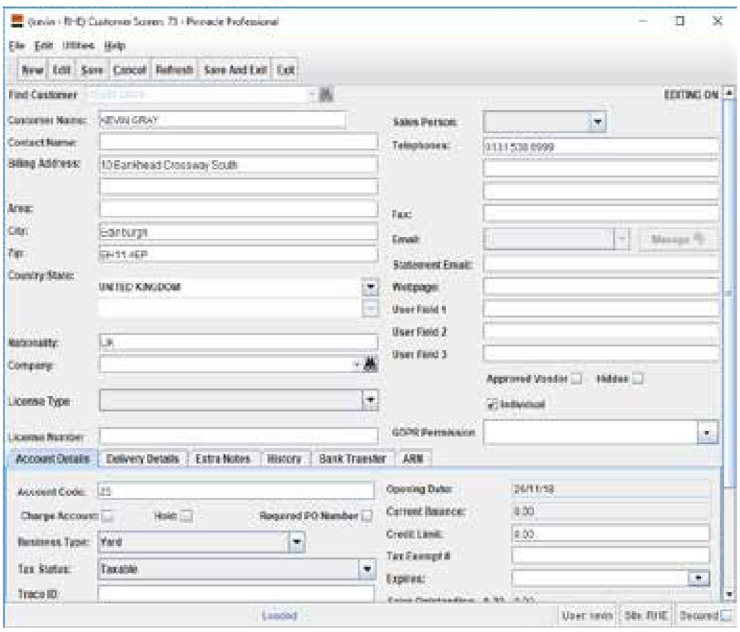
- Hide Account Information by checking the Hidden checkbox
- Mark account as an individual rather than a company by checking the indvidual check box
- Set Date GDPR Permission was granted
- Anonymise account so no Personal details are stored.

How to access and anonymise customer account data.

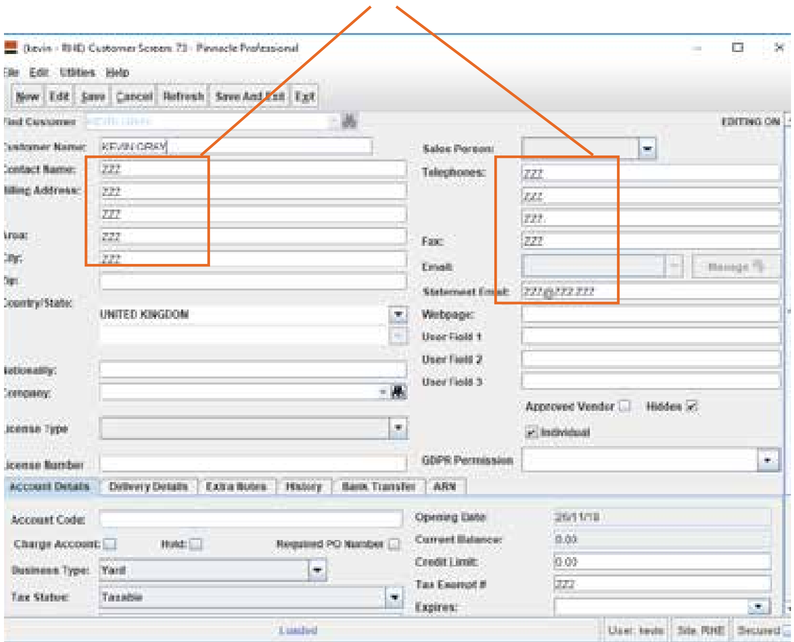
From the customer screen within Pinnacle 18.2 select (Utilities > Anonymise)

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



After



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