



GDPR Process Guidance

For any issues relating to any of the items included please contact the Pinnacle Helpdesk at support.portal@pinewood.co.uk

Contents

CRM	3
Adding GDPR Contact Preferences – Existing Customers	3
Adding GDPR Contact Preferences –Creating New Customers	8
Aftersales Diary Processing	11
Showroom.....	15
Adding GDPR Contact Permissions	15
Workshop	18
Capturing Permissions Through Workshop Booking.....	18
Amending Permissions within Parts and Workshop Invoice Screens	22
Customer Permissions	24
Customer View to Update Their Permissions	24

CRM

Adding GDPR Contact Preferences – Existing Customers

Within CRM > Enquiry, search the desired customer using information in the fields to search;

Customer / Vehicle Enquiry

Enter Customer Or Vehicle Details

Surname	<input type="text" value="Jones"/>	Post Code	<input type="text"/>	Reg No	<input type="text"/>
Forename	<input type="text"/>	Telephone	<input type="text"/>	VIN	<input type="text"/>
Company	<input type="text"/>	Email Address	<input type="text"/>	Fleet No	<input type="text"/>

Search Results

Select the customer that is required from the search results presented.

This will take you to the Main Tab.

Select the Contact Tab.

On screen you will see the customers Allowable Contact Methods.

Main	Customer	Additional	Desired Vehicle	Contact	Vehicles	Service Details	Deposits	Ass
Contact Details - Mr Phil Jones								
Contact Status								
Customer Status			Dealt					
Allowed Contact Methods				Marketing Consent				
Email	✓	Vehicle Offers and Services						
Mailshots	✓	Event Invitations						
Phone	✓							
SMS	✓							

If you double click into this box, you will be able to view the current Permissions the customer has allowed for allowable contact methods and any GDPR related questions that have been set up;

Training 1 Sales - 0121 697 6500

Main Customer Additional Desired Vehicle **Contact** Vehicle

Contact Details - Mr Phil Jones

Contact Status

Customer Status: Dealt

Allowed Contact Methods: Marketing Consent

Email: ✓ Vehicle Offers and Services

Mailshots: ✓ Event Invitations

Phone: ✓

SMS: ✓

Future Contacts

Date	Start Time	End Time	Reason
17/05/2018	13:15		En

Data Protection

Allowable Contact Methods

Email: ✓ Mailshots: ✓ Phone: ✓ SMS: ✓

Vehicle Offers And Services

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email: ✗ Mailshots: ✗ Phone: ✗ SMS: ✗

Event Invitations

From time to time we would like to invite our most valued customers to attend VIP events for new product launches or special offer days. Tell us how best to invite you to these prestigious events?

Email: ✗ Mailshots: ✗ Phone: ✗ SMS: ✗

Vehicle Manufacturer

To offer you the best service possible we may share you information with the Vehicle Manufacturer, who may wish to contact you about products and services they offer. Please select below which methods of contact you would like to receive these offer on?

Email: ✗ Mailshots: ✗ Phone: ✗ SMS: ✗

Created By: Amended By:

Export Close

If you would like to amend these permissions, select the Add Contact History button.

Main Customer Additional Desired Vehicle **Contact** Vehicles Service Details Deposits Associations Spend

Contact Details - Mr Phil Jones

Contact Status

Customer Status: Dealt

Allowed Contact Methods: Marketing Consent

Email: ✓ Vehicle Offers and Services

Mailshots: ✓ Event Invitations

Phone: ✓

SMS: ✓

Contact History

Pinewood (TM 102950) Outbound Action - Training 1 Sales	17/05/2018 10:27
Letter : Additional contact required	
Nick Pinewood Outbound Letter - Training 1 Sales	03/04/2018 15:16
Mailshot: Service and MOT Reminder	
Nick Pinewood Outbound Letter - Training 1 Sales	03/04/2018 15:07
After sales letter (Service and MOT Reminder) for AS 2	

Next ↓

Add Contact History Export Contact History Delete Item Delete All

Future Contacts

Date	Start Time	End Time	Reason	Type	Activities	Salesperson	Notes
17/05/2018	13:15		Enquiry	Telephone		Ellen Ripley	

Video Documents Remove Future Contact Add Future Contact

When you select the Add Contact History button, this will prompt you to fill in the fields for the type of contact.

Fill these in as is applicable and select Save;

The screenshot shows a web application interface for 'Contact Details - Mr Phil Jones'. The top navigation bar includes tabs for Main, Customer, Additional, Desired Vehicle, Contact (highlighted), Vehicles, Service Details, Deposits, and Ass. Below the navigation, the form is titled 'Contact Details - Mr Phil Jones' and has a sub-header 'Todays Contact'. The form contains several fields: Salesperson (Pinewood Training), Contact Category (Service), Contact Reason (Letter), Contact Method (Action), Present Vehicle (AS 2 Land Rover Discovery), Inbound/Outbound (Outbound), Customer Status (Dealt), CSI Rating (Please Select...), and Contact Notes (Further Action Required). At the bottom of the form, there are three buttons: 'Upload Document', 'Save' (highlighted with a red box), and 'Cancel'.

Once Save is selected, the pop up window to amend GDPR will appear;

The screenshot shows a 'Data Protection' pop-up window. The window has a title bar 'Data Protection' and a sub-header 'Allowable Contact Methods'. Below this, there are four sections: 'Allowable Contact Methods', 'Vehicle Offers And Services', 'Event Invitations', and 'Vehicle Manufacturer'. Each section has checkboxes for 'Email', 'Mailsots', 'Phone', and 'SMS'. The 'Allowable Contact Methods' section has all four checkboxes checked. The 'Vehicle Offers And Services' section has all four unchecked. The 'Event Invitations' section has all four unchecked. The 'Vehicle Manufacturer' section has all four unchecked. At the bottom of the window, there are fields for 'Created By' and 'Amended By', and 'Save' and 'Cancel' buttons.

Once this window appears, you are then able to view the questions and the methods of contact.

Here you are then able to choose the customers preferred methods of contact relating to each question that has been set up in regards to GDPR and if applicable the customers allowable contact methods.

Once the customer has given their consent for the methods they prefer for each question, select the Save button;

Data Protection

Allowable Contact Methods

Email Mailshots Phone SMS

Vehicle Offers And Services

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email Mailshots Phone SMS

Event Invitations

From time to time we would like to invite our most valued customers to attend VIP events for new product launches or special offer days. Tell us how best to invite you to these prestigious events?

Email Mailshots Phone SMS

Vehicle Manufacturer

To offer you the best service possible we may share you information with the Vehicle Manufacturer, who may wish to contact you about products and services they offer. Please select below which methods of contact you would like to receive these offer on?

Email Mailshots Phone SMS

Created By _____ Amended By _____

Save
Cancel

Once saved, you will then be presented with the Contact Diary window, to complete the next contact option, complete the correct details and select Save.

Contact Diary - Pinewood Training Division - Training Division | 21/05/2018

Thursday 17 May	Friday 18 May	Saturday 19 May	Sunday 20 May	Monday 21 May	Tuesday 22 May	Wednesday 23 May
24 May	25 May	26 May	27 May	28 May	29 May	30 May
31 May	01 June	02 June	03 June	04 June	05 June	06 June
07 June	08 June	09 June	10 June	11 June	12 June	13 June

Today Next ↓

Next Contact

Customer: Mr Phil Jones

Contact Category: Sales

Contact Reason: Letter

Contact Method: Letter

Letter: Service Reminder

Contact Duration: 11 - 15

User: Pinewood Training

Contact Notes: 1,000 characters remaining

Appointments

Start...	End...	Name	Customer Status	Contact Meth...

Activities

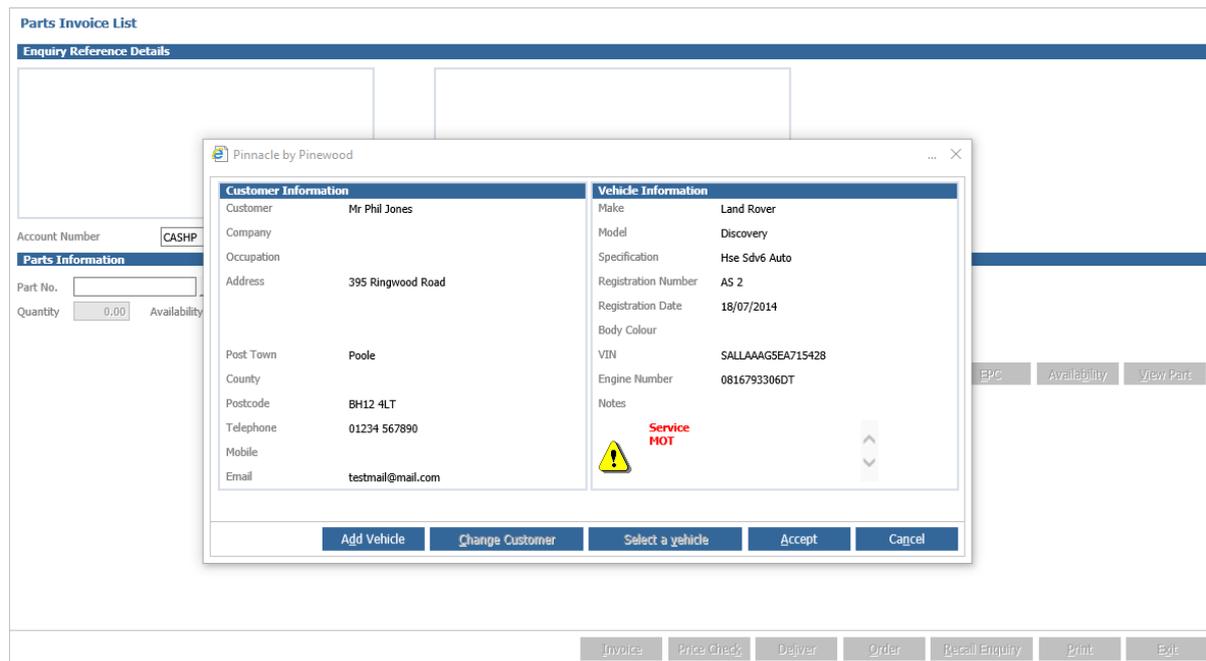
Handover

Contact Preferences
Demonstrator Availability
Save
Cancel

Once these have been updated, this will also update within the customer contact history.

When accessing customer details through Parts, Workshop and Vehicles, you would follow the same process of searching the required customer and selecting the desired record.

Once you have the customer information on screen;



Drill in to the Customer Information window and see this will present the record on the Main tab.

Use the above steps to Add Contact History to update the customers GDPR Question permissions for contact.

Workshop does have a process when making a workshop booking that is detailed on page 18.

Adding GDPR Contact Preferences –Creating New Customers

When creating a new customer within CRM > Enquiry, search the required field and select the New Customer button;

Customer / Vehicle Enquiry

Enter Customer Or Vehicle Details

Surname: Post Code: Reg No:
 Forename: Telephone: VIN:
 Company: Email Address: Fleet No:

Search Results

Customer	Company	Address	Post Code	Telephone
Mr Bob Jones				
Mr David Jones				
Miss Debbie Jones		50 Grove Road, Eastbourne, BN21 4UD	BN21 4UD	
Mr PHIL JONES		395 Ringwood Road, Poole, BH12 4LT	BH12 4LT	01234567890
 Mr Phil Jones		395 Ringwood Road, Poole, BH12 4LT	BH12 4LT	01234567890
Mr Tom Jones		123 Lord Street, Poole, Dorset		01234555555

You will be presented with the Customer Details screen to enter the customer’s details and recommended or mandatory fields.

Plain **Customer** Additional Desired Vehicle Contact Vehicles Service Details Deposits Associations Spend

Customer Details - 

Customer Information

Title: Occupation:
 Forenames: Job Title:
 Surname: * Contact Name:
 Company Name: Dear Name:
 Address: Personal Notes:
 Interests:
 Post Town: Created By:
 County: Amended By:
 Post Code: MPS **Other Details**
 Country: Intro Source: *
 Email 1: * Account Name:
 Email 2: Customer Type:
 Email 3: Department: *
 Association:

Telephone Numbers

Telephone: Ext: TPS Preferred: Time:
 Mobile:
 Work:
 Fax:

Notes

1000 characters remaining

Once all required fields are saved, select the Save button.

Contact History will need to be added for the customer.

Fill these in as is applicable and select Save;

Main Customer Additional Desired Vehicle Contact Vehicles Service Details Deposits Asst

Contact Details - Mr Phil Jones

Todays Contact

Salesperson: Pinewood Training

Contact Category: Service

Contact Reason: Letter

Contact Method: Action

Present Vehicle: AS 2 Land Rover Discovery

Inbound/Outbound: Outbound

Customer Status: Dealt

CSI Rating: Please Select...

Contact Notes: Further Action Required

Upload Document **Save** Cancel

Once Save is selected, the pop up window to amend GDPR will appear;

Training 1 Sales - 0121 697 6500

Main Customer Additional Desired Vehicle Contact Vehicles

Contact Details - Mr Phil Jones

Todays Contact

Salesperson: Pinewood Training

Contact Category: Service

Contact Reason: Letter

Contact Method: Action

Present Vehicle: AS 2 Land Rover Discovery

Inbound/Outbound: Outbound

Customer Status: Dealt

CSI Rating: Please Select...

Contact Notes

Upload Document

Future Contacts

Date	Start Time	End Time	Reason
17/05/2018	13:15		Engage

Data Protection

Allowable Contact Methods

Email Mailsots Phone SMS

Vehicle Offers And Services

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email Mailsots Phone SMS

Event Invitations

From time to time we would like to invite our most valued customers to attend VIP events for new product launches or special offer days. Tell us how best to invite you to these prestigious events?

Email Mailsots Phone SMS

Vehicle Manufacturer

To offer you the best service possible we may share you information with the Vehicle Manufacturer, who may wish to contact you about products and services they offer. Please select below which methods of contact you would like to receive these offer on?

Email Mailsots Phone SMS

Created By: Amended By:

Save Cancel

Once this window appears, you are then able to view the questions and the methods of contact.

Here you are then able to choose the customers preferred methods of contact relating to each question that has been set up in regards to GDPR and if applicable the customers allowable contact methods.

Once the customer has given their consent for the methods they prefer for each question, select the Save button.

If no permissions have been chosen at this point, this will still generate the contact preference email so the customer can select their own preferences.

Please note that the customer will require an email address to be specified at the point of creation for this method of contact to generate once the Contact History is added.

The contact history will then be updated at this point;

Contact History

Pinewood Training Outbound Email - Training 1 Sales	17/05/2018 16:05
Contact Preferences sent to support.portal@pinewood.co.uk	
Pinewood Training Outbound Action - Training 1 Sales	17/05/2018 16:05
Letter : Adding GDPR history . Contact Preferences Updated	

Aftersales Diary Processing

Within CRM > Parameters > Communications > Data Protection > Process Mapping, we can set Permissions for the Aftersales Diary for Consent Categories.

Within Process you will see the ASD Event.

Process	Please Select...
Category	ASD Event Email Letter
Description	Please Select... ▼
Consent Categories	Please Select... ▼

Once selected you will be able to choose the Description field which will display all the possible events that can appear within the aftersales diary.

By default, if nothing is selected no consent is required to any of the forms of communications for a customer regarding the Aftersales Diary.

You do not need to create this mapping, if you do not require customer consent to contact them regarding Aftersales Diary contacts.

The Allowable contact methods will still work as they do currently i.e. if they do not allow SMS, they will not receive an SMS.

This mapping process has been added so should a contact be deemed that permissions should be acquired;

Process	ASD Event ▼
Description	Please Select...
Consent Categories	<ul style="list-style-type: none"> Commercial Bookings Due Commercial Unconfirmed Bookings Contract Expiry CSI Follow Up Equipment Finance General Follow Up Insurance MOT Other Overdue Booking Parts Awaited Parts Order Recall/Campaign Replacement Date Scheduled Interval Check Service Service Plan Expiry User Defined Date 2 User Defined Date 3 Variable Servicing Warranty Work Required
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

In the below example we will select the MOT option as the reason for contact, which may require a permission.

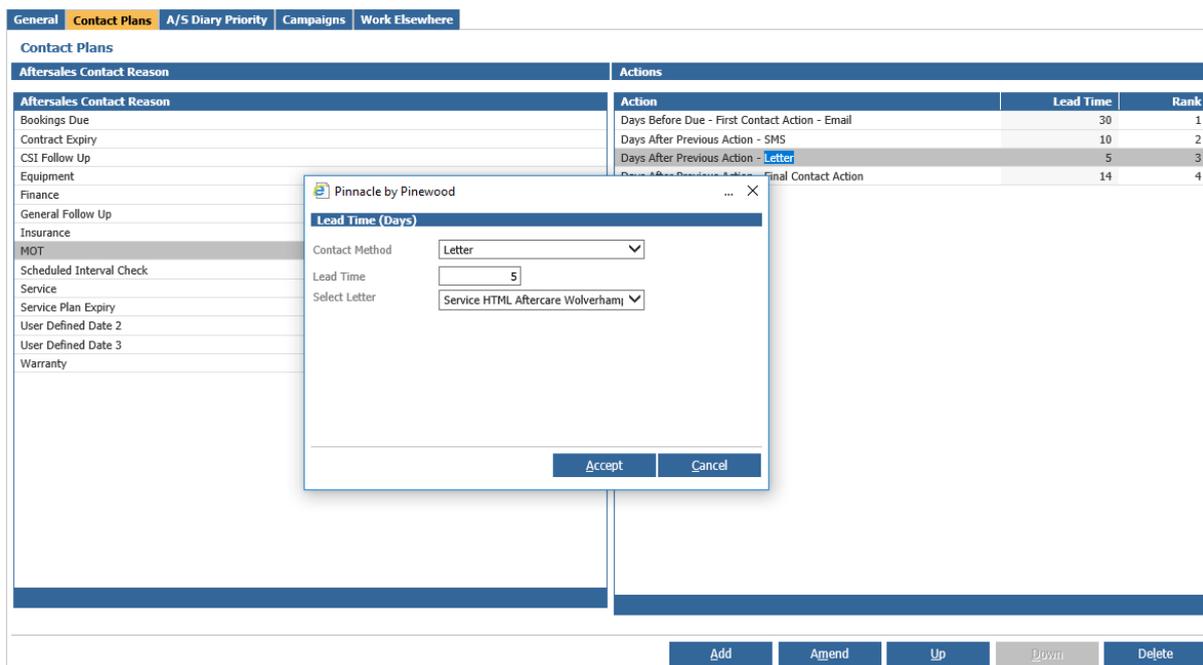
You can then select the Consent Categories Required. You can select more than one if required.

Within CRM > Parameters > Aftersales Parameters > Contact Plans.

The set up contained is unchanged, however if you were to set up Processes Mapping for any of the events, it will take into account any of the consent categories that have been set against the mapping, when attempting the methods of contact set.

For example, if the customer has not allowed the email flag for the Consent Category set, then this form of communication will not be sent.

The email and letter options will have selected Letter or email HTML held against them;



If these have also been mapped within the Process Mapping for contact, then the same Consent Category options will also be taken into account before any communication is sent.

This would occur if you have Letter/Email templates set within Process Mapping and also the Aftersales Diary Event.

If you did not want to set up Processing Mapping against all the events, then the Letter or Email can be set up as templates with the Consent Categories required and the system would look at these permissions.

Aftersales Diary Processing

Within the Aftersales Diary you will see some changes regarding contact.

For example, if Telephone is not an allowed contact for any Aftersales Processing Mapping that has been set, you will see the  icon against the line as displayed below;

Aftersales Diary

Mrs Linda Charie

Porsche Centre

Test Drive ✓ Presentation ✓ Appraisal ✗ Quote ✗ Business Manager ✗

Vehicles	Event	Due Date	Attempts
Porsche Boxster (981) s K6 LEC	Work Required - UNDERSIDE - EXHAUST SYSTEM CONDITION - cat to manifold bolts badly corroded. - 0.00	03/10/2016	0 <input type="checkbox"/>
	Warranty	25/09/2017	0 <input type="checkbox"/>
	Service	08/05/2018	0 <input type="checkbox"/>

Today's Events: 1

View Vehicle Process Fail Back

If there are any Process Mappings set against the Event, then these will be taken into account. If there are not Process Mappings set, then the Event will display with no permissions taken into account. The below example shows the MOT line has the icon that states that customer does not wish to be contacted via telephone. This event has been set up within Process Mappings with a Consent Category set. The customer has declined to be contacted by telephone for this Category. The Service line, has no Process Mappings and therefore no Consent Category is being taken into account;

Event	Due Date	Attempts
MOT	30/09/2017	0 <input type="checkbox"/>
Service	14/05/2018	0 <input type="checkbox"/>

View Vehicle Process Fail Back

If you hover over the event, you can see what Categories have been mapped to that event;

Event	Aftersales	Due Date	Attempts	
MOT		30/09/2017	0	<input type="checkbox"/>
Service		14/05/2018	0	<input type="checkbox"/>

[View Vehicle](#)

If you then click on the  icon, you can view what permissions have been allowed;

Aftersales Diary

Pinnacle By Pinewood

Data Protection

Allowable Contact Methods

Email Mailshots Phone SMS

Vehicle Offers And Services

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email Mailshots Phone SMS

Aftersales

It is important that you ensure your vehicle is roadworthy at all times. Knowing when your car needs attention is sometimes difficult. Would like us to remind you of all the key services your vehicles needs

Email Mailshots Phone SMS

Partner Integration

We will share your data with chosen partners to ensure you receive the best possible service and offers that will be of interest to you. Please consent below using the contact method preferences/

Email Mailshots Phone SMS



Due Date	Attempts	
	30/09/2017	0 <input type="checkbox"/>
	14/05/2018	0 <input type="checkbox"/>

If there are other contacts available that do not have Categories set that you can continue with the contact.

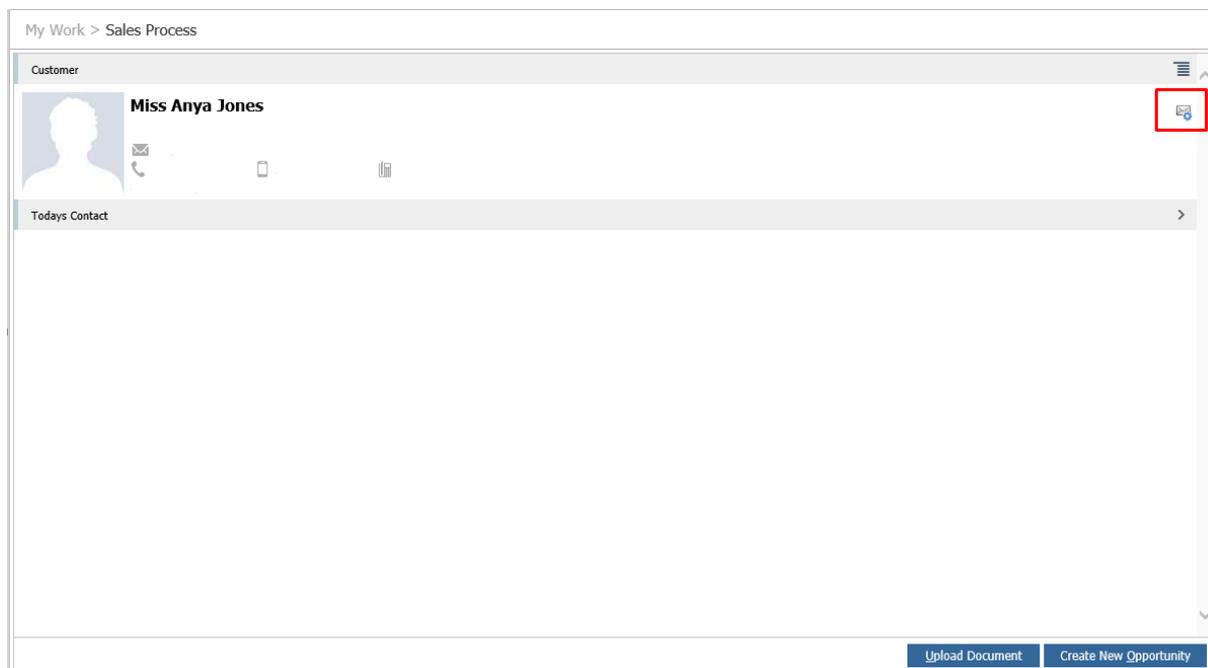
If you are unable to continue with the contact due to the permissions set, you can process via decline or no further reminders. However, it is possible that there may be other methods of contact that have been allowed for this event so this could be processed as a Decline so that this can be re-calculated for the following year.

Showroom

Adding GDPR Contact Permissions

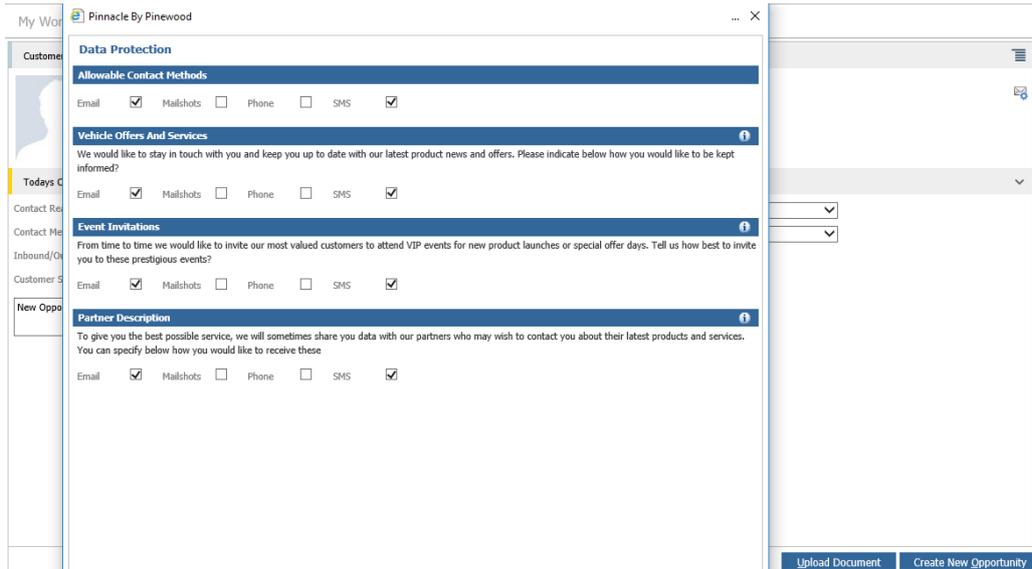
If we were to demonstrate this in practice as below within Showroom.

The user selects the Walk in tile and searches for a customer;

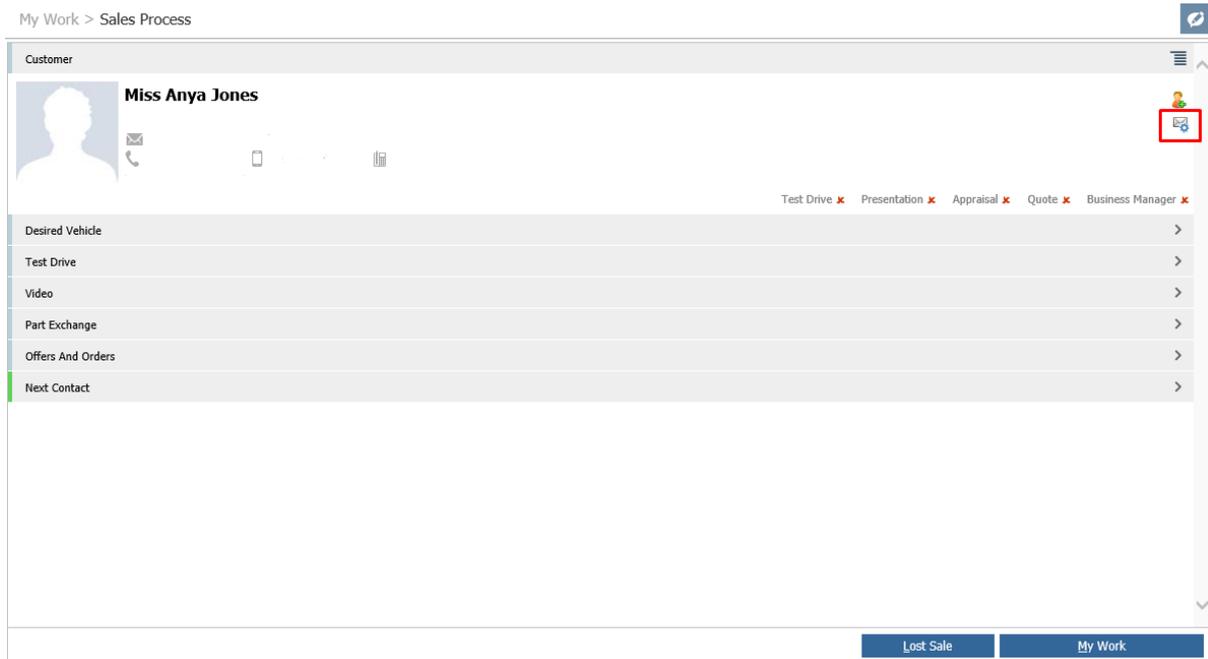


In the top right of the screen you will see an  icon. This allows the user to view the customer's permissions in a read only view.

If the user was then to create an Opportunity, as part of the process of creating the contact the ability to amend those preferences will then be available.



Throughout the process, the  icon to view the Marketing Preferences will be available via the icon.



If the user were to create a new customer on creation of creating that customer, the user will always be prompted with the permissions capture window;

My Work > Sales Proc Pinnacle By Pinewood

Customer

Mr Da 0121

Full Name
Company Name
Telephone
Email
Department

Today's Contact

Contact Reason
Contact Method
Inbound/Outbound
Customer Status

New Opportunity Created

Data Protection

Allowable Contact Methods

Email Mailshots Phone SMS

Vehicle Offers And Services

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email Mailshots Phone SMS

Event Invitations

From time to time we would like to invite our most valued customers to attend VIP events for new product launches or special offer days. Tell us how best to invite you to these prestigious events?

Email Mailshots Phone SMS

Partner Description

To give you the best possible service, we will sometimes share you data with our partners who may wish to contact you about their latest products and services. You can specify below how you would like to receive these

Email Mailshots Phone SMS

Created By Amended By

Create New Opportunity

When viewing the customers Contact History, like within CRM, you can see the Opportunity that was created and also the Customer Preferences Updated;

Contact History - Mr David Davies

Contact History

Vehicle: All Start Date: DD/MM/YYYY

User: All End Date: DD/MM/YYYY Group By: Flat View Search

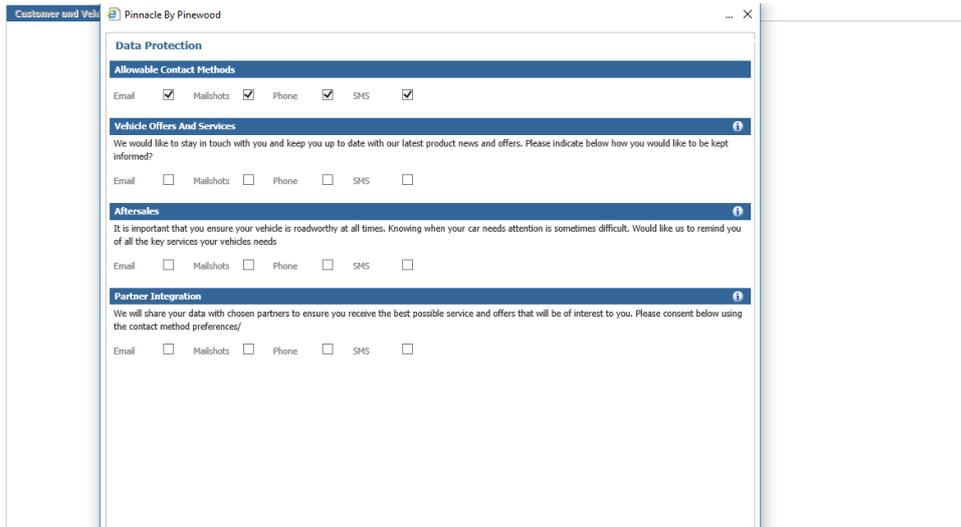
Pinewood : Inbound Showroom

New Opportunity : New Opportunity Created. Contact Preferences Updated

Workshop

Capturing Permissions Through Workshop Booking

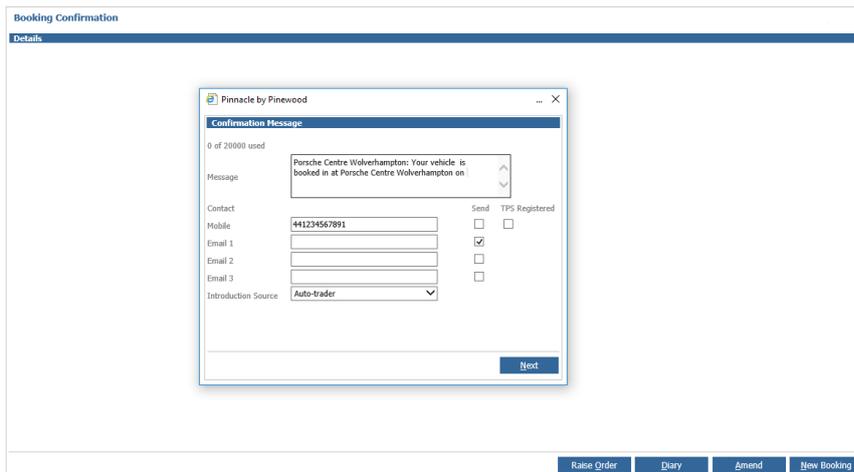
When creating a Workshop booking, you would create this using the normal process. The permissions window will appear once accepting the booking as created;



It is at this point you can view and also amend any of the permissions given if necessary.

Once complete you can save the any changes made.

This will then continue to the booking confirmation screen.



If you were to then look at the customer contact history within their CRM record, you are able to view that while there was a Workshop booking created, the customers contact preferences have also been updated if these were changed at this point.

Contact History	
Pinewood (TM 102950) Outbound Action - Porsche Centre Wolverhampt ...	07/05/2018 21:24
Workshop Booking Creation (BD16 UCV). Contact Preferences Updated	
Pinewood (TM 102950) Inbound Telephone - Porsche Centre Wolverham ...	06/05/2018 18:04
Cleanse Feedback : change permissions . Contact Preferences Updated	
Sarah Bishop Outbound Action - Porsche Centre Wolverhampt ...	07/11/2016 15:57
Workshop Booking Amendment (BD16 UCV)	

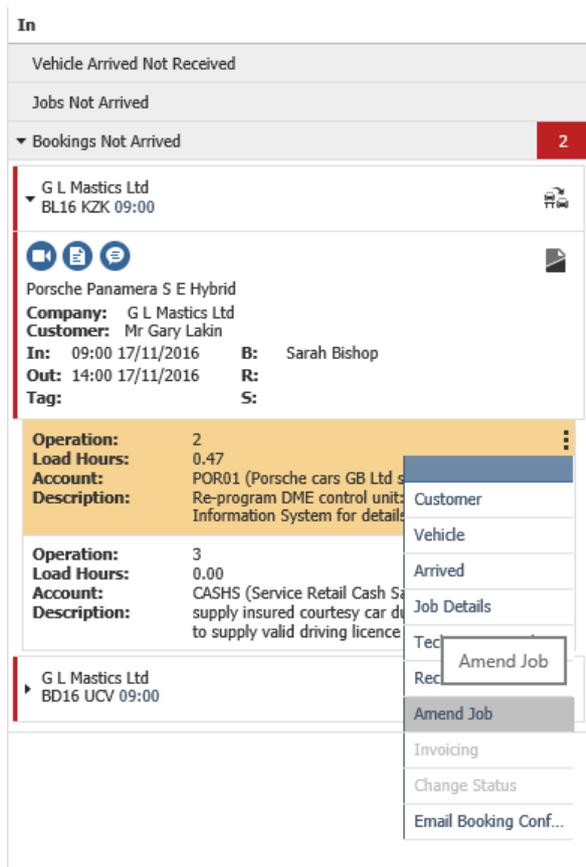
Next ↓

The functionality is also available when amending a workshop booking through the Diary or through the Job Progress screen.

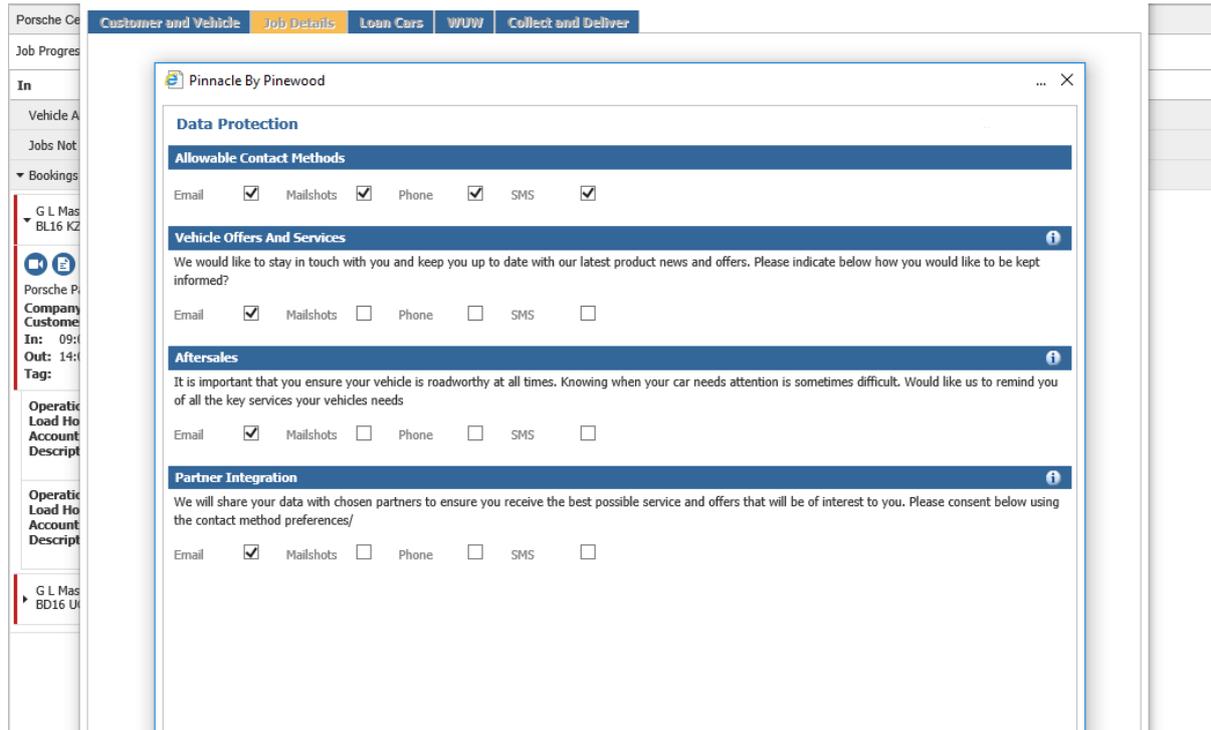
Within the Job Progress screen if the customer is searched;

In	Work In Progress	Out
Vehicle Arrived Not Received	Not Started	Completed
Jobs Not Arrived	Work In Progress	Costed
▼ Bookings Not Arrived 2	Awaiting Authorisation	Contacted
<ul style="list-style-type: none"> <div style="border: 1px solid red; padding: 2px;"> G L Mastics Ltd BL16 KZK 09:00 </div> <div style="border: 1px solid red; padding: 2px;"> G L Mastics Ltd BD16 UCV 09:00 </div> 	<ul style="list-style-type: none"> On Hold Resume Quality Control 	

Selecting the Amend Job option to amend the booking;



Once any desired changes are made, and the Accept button is selected, the Capture Permissions Window is presented;



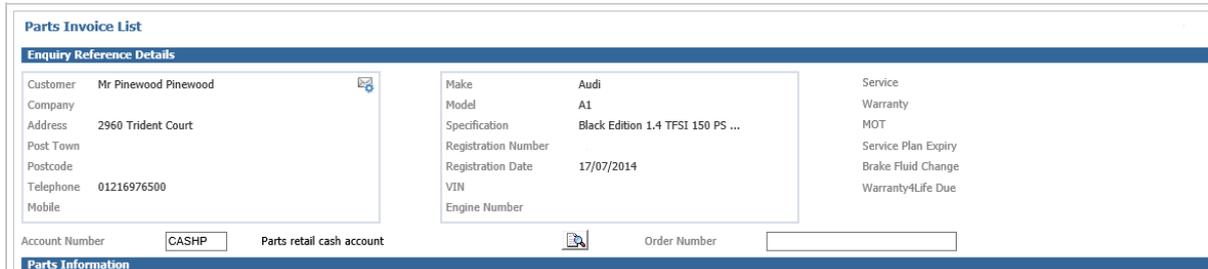
Any changes if required can be made, once accepted it will lead to the booking confirmation screen.

In the event that no contact permissions changes have been made, the contact history will only state any changes made to the booking;

Contact History	
Pinewood (TM 102950) Outbound Action - Porsche Centre Wolverhampt ...	07/05/2018 21:41
Workshop Booking Amendment (BL16 KZK)	
Pinewood (TM 102950) Outbound Action - Porsche Centre Wolverhampt ...	07/05/2018 21:24
Workshop Booking Creation (BD16 UCV). Contact Preferences Updated	
Pinewood (TM 102950) Inbound Telephone - Porsche Centre Wolverham ...	06/05/2018 18:04
Cleanse Feedback : change permissions . Contact Preferences Updated	
Next ↓	

Amending Permissions within Parts and Workshop Invoice Screens

Within the Workshop > Invoicing > Produce Invoice screen or the Parts > Sales > Invoice screen, there is an  icon displayed once a customer record is present within the customer and vehicle information box.



Parts Invoice List

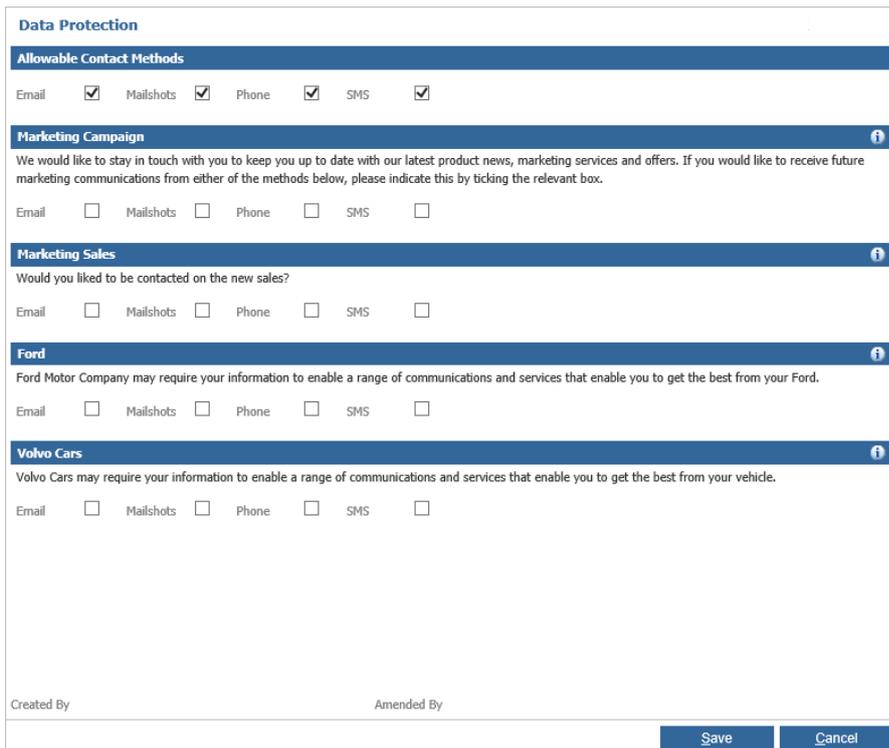
Enquiry Reference Details

Customer	Mr Pinewood Pinewood 	Make	Audi	Service
Company		Model	A1	Warranty
Address	2960 Trident Court	Specification	Black Edition 1.4 TFSI 150 PS ...	MOT
Post Town		Registration Number		Service Plan Expiry
Postcode		Registration Date	17/07/2014	Brake Fluid Change
Telephone	01216976500	VIN		Warranty4Life Due
Mobile		Engine Number		

Account Number: Parts retail cash account  Order Number:

Parts Information

Once the icon is selected this will present the Data Protection Permissions screen;



Data Protection

Allowable Contact Methods

Email Mailshots Phone SMS

Marketing Campaign 

We would like to stay in touch with you to keep you up to date with our latest product news, marketing services and offers. If you would like to receive future marketing communications from either of the methods below, please indicate this by ticking the relevant box.

Email Mailshots Phone SMS

Marketing Sales 

Would you like to be contacted on the new sales?

Email Mailshots Phone SMS

Ford 

Ford Motor Company may require your information to enable a range of communications and services that enable you to get the best from your Ford.

Email Mailshots Phone SMS

Volvo Cars 

Volvo Cars may require your information to enable a range of communications and services that enable you to get the best from your vehicle.

Email Mailshots Phone SMS

Created By: _____ Amended By: _____

Here the users within Parts and Workshop are able to amend permissions for the customers by selecting the  icon and discussing with the customer questions and contact methods associated. Once all the methods have been confirmed with the customer, the user can select Save and these will update the customer's permissions. If enabled, this will send the customer an email to view and amend their preferences.

This will also update the customer contact history and will stipulate the area the contact was updated;

Contact History	
Pinewood (TM 102950) Inbound - Winchombeshire Parts	15/06/2018 11:47
Parts Invoice - Contact Preferences Updated	
Pinewood (ML) Outbound - Car Stores VM Vehicle Order Cancelled	17/08/2017 14:55
Pinewood (ML) Outbound - Car Stores VM Vehicle Order Cancelled	17/08/2017 14:54

Next ↓

Customer Permissions

Customer View to Update Their Permissions

Once the email has been sent the user can view the email as below;

Confirm Your Marketing Permissions

You have recently request to change, add or amended your marketing permissions with Pinewood Technologies. To review or update you permissions, please click the link below.

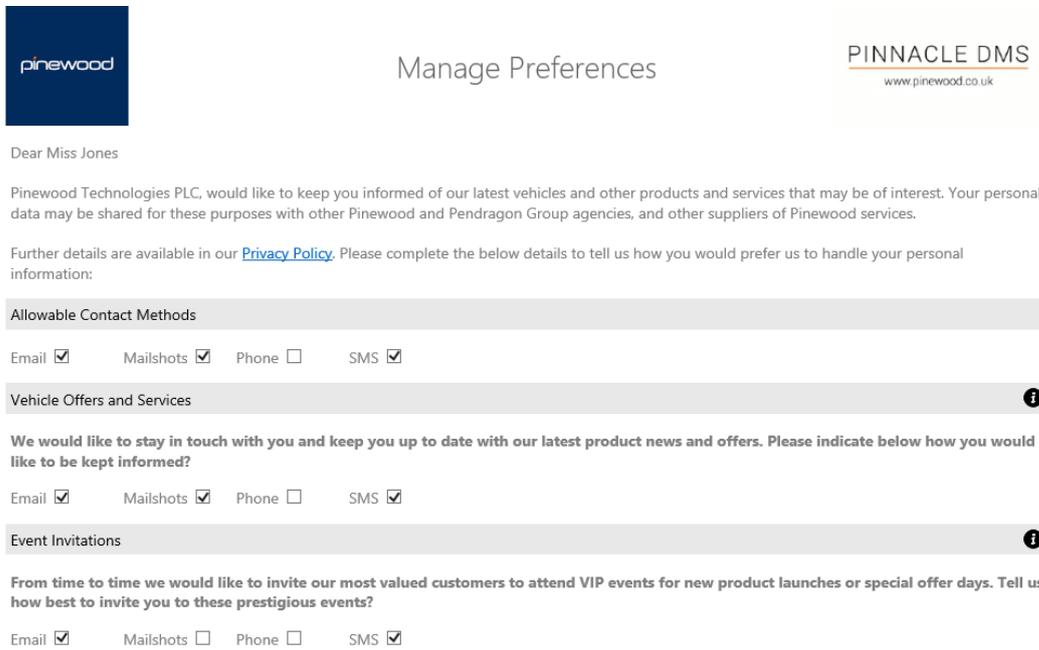
Update Your Permissions

[Contact Preferences](#)

If you have not changed or requested this email, then call us on 01223 312122

Using the Hyperlink within the email, the customer can then manage their own permissions.

The customer, from this email can then update and amend their preferences.



The customer can hover over the  button to view the additional details.

Vehicle Offers and Services 

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email Mailshots Phone SMS

Based on information we hold against your record, we will invite you to events that may be of interest to you, this could include vehicle launches, or specific VIP events.

Event Invitations 

From time to time we would like to invite our most valued customers to attend VIP events for new product launches or special offer days. Tell us how best to invite you to these prestigious events?

Email Mailshots Phone SMS

Once they have completed any changes they wish to make, they can select the update button.

Event Invitations 

From time to time we would like to invite our most valued customers to attend VIP events for new product launches or special offer days. Tell us how best to invite you to these prestigious events?

Email Mailshots Phone SMS

Partner Description 

To give you the best possible service, we will sometimes share you data with our partners who may wish to contact you about their latest products and services. You can specify below how you would like to receive these

Email Mailshots Phone SMS

[Update](#)

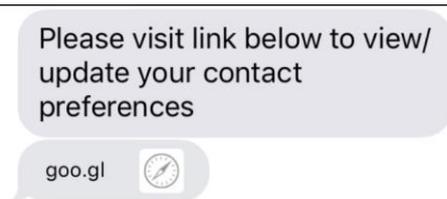
Once updated the email will confirm these changes have been made;

Contact Preferences Updated!

The customer's preferences will then be changed within Pinnacle.

If the customer receives an SMS message, they can then select the options in the same way as with the email process.

Within the text they can select the short link added.



Once selected they can then view the page to amend and update their preferred contact methods.

Further details are available in our [Privacy Policy](#). Please complete the below details to tell us how you would prefer us to handle your personal information:

Allowable Contact Methods

Email

Mailshots

Phone

SMS

Vehicle Offers and Services ⓘ

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email

Mailshots

Phone

SMS

The user can select the ⓘ icon to view the additional details held against the question.

Vehicle Offers and Services ⓘ

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email

Mailshots

Phone

SMS

Based on information we hold against your record, we will invite you to events that may be of interest to you, this could include vehicle launches, or specific VIP events.

We would like to stay in touch with you and keep you up to date with our latest product news and offers. Please indicate below how you would like to be kept informed?

Email

Mailshots

Phone

SMS

Once they have selected the options required, they can select the Update button.

Event Invitations ⓘ

From time to time we would like to invite our most valued customers to attend VIP events for new product launches or special offer days. Tell us how best to invite you to these prestigious events?

Email

Mailshots

Phone

SMS

Partner Description ⓘ

To give you the best possible service, we will sometimes share you data with our partners who may wish to contact you about their latest products and services. You can specify below how you would like to receive these

Email

Mailshots

Phone

SMS

If the customer chooses to update their current permissions, this information is then updated within Pinnacle and this can be seen within the Customers Contact history also.