

# **GDPR** Process Guidance

For any issues relating to any of the items included please contact the Pinnacle Helpdesk at <a href="mailto:support.portal@pinewood.co.uk">support.portal@pinewood.co.uk</a>

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# 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 C	Or Vehicle Details									
Surname	Jones	Post Code		Reg No						
Forename		Telephone		VIN						
Company		Email Address		Fleet No						
								<u>S</u> earch	Ω	lear
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
Conta	act Details	- Mr Phil J	ones 🚙					
Conta	ct Status							
Custo	mer Status		Dealt					
Allov	ed Contact N	1ethods	Marketing Co	onsent				
Email		1	Vehicle Offers	and Services	5			
Mailsł	nots	1	Event Invitatio	ins				
Phone		1						
SMS		1						

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;

Т	raining 1 Sales - 0121 697	7 6500		🥘 Pinna	cle By P	inewood						×
U	Main Customer A	dditional D	esired Vehicle Contact Vehic	ic Data I	rotec	tion						
	Contact Details -	Mr Phil Jon	es 🥔	Allowat	le Cont	act Methods	;					
н	Contact Status			Email		Mailshots	4	Phone	4	SMS	1	
н	Customer Status	De	alt	Linda	· •	Pidilatioca	÷	1 Horic	÷	3113	•	
н	Allowed Contact Met	thods	Marketing Consent	Vehicle	Offers /	and Services	;					0
	Email	×	Vehicle Offers and Services	We woul informed	d like to : ?	stay in touch	with you	and keep y	/ou up to	date with	latest product news and offers. Please indicate below h	ow you would like to be kept
	Mailshots	×	Event Invitations	Email	×	Mailshots	×	Phone	×	SMS	×	
	Phone	×										
	SMS	×		Event I	nvitatio	15						0
				From tim you to th	e to time ese pres	we would lik tigious events	e to invi ?	te our most	valued o	ustomers to	tend VIP events for new product launches or special of	er days. Tell us how best to invite
				Email	×	Mailshots	×	Phone	×	SMS	×	
1				Vehicle	Manufa	cturer						6
				To offer offer, Ple	you the l	est service po	ossible w h metho	ve may shar ds of contar	re you int	ormation w	the Vehicle Manufacturer, who may wish to contact you sive these offer on?	about products and services they
н				Email	×	Mailebote	*	Dhana	*	CMC	*	
				Email	-	Mailshots	^	Phone	<b>^</b>	2142	<b>^</b>	
				-								
н	Future Contacts											
н	Date	Start Time	End Time R	2e								
н	17/05/2018	13:15	Er	in								
н												
н												
				Created B	y					Ame	ed By	
Ľ											Ex	port <u>C</u> lose

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

Main	Customer	Additional	Desired Vehicle	Contact	Vehicles	Service Details	Deposits	Ass	ociations S	Spend						
Cont	act Details	- Mr Phil J	ones 🥔												2	f in 8+
Cont	act Status								Contact Hi	story						
Cust	omer Status		Dealt													
Allo	wed Contact M	lethods	Marketing C	onsent					Pinewood (1 Outbound A	TM 102950) ction - Trai	) ning 1 Sales					17/05/2018 10:27
Emai	il	1	Vehicle Offers	and Service	5				Letter : Ad	ditional con	tact required					
Mails	shots	~	Event Invitation	ons					Nick Pinewo Outbound Lo	od etter - Traii	ning 1 Sales					03/04/2018 15:16
Phon	ie	1							Mailshot: Se	ervice and N	10T Reminder					
SMS		×							Nick Pinewo Outbound Lo	od etter - Traii	ning 1 Sales					03/04/2018 15:07
																Next↓
						<u>A</u> dd Co	ontact Histor	y				<u>E</u> xport	t Contact History	<u>D</u> elet	e Item	<u>D</u> elete All
Futu	re Contacts															
Dat	e	Start Tim	ne End Ti	ime	Reaso	n Ty	ре		Activities		Salesperson	No	ites			
17/0	05/2018	13:15			Enquiry	r Te	lephone				Ellen Ripley					
										<u>V</u> ideo	Doc <u>u</u> n	nents	<u>R</u> emove Futur	e Contact	Add <u>F</u>	uture Contact

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

Nain Customer	Additional Desired	d Vehicle Contact	Vehicles	Service Details	Deposits	Ass
Contact Details	- Mr Phil Jones	<i></i>				
Todays Contact						
Salesperson	Pinewood Train	ning				
Contact Category	Service		~			
Contact Reason	Letter		~			
Contact Method	Action		~			
Present Vehicle	AS 2 Land Rov	er Discovery	$\checkmark$			
Inbound/Outbound	Outbound		$\checkmark$			
Customer Status	Dealt		~			
CSI Rating	Please Select.,		$\sim$			
Contact Notes	Further Action	Required				
						$\sim$
		<u>U</u> pload Do	ocument	<u>S</u> ave	<u>C</u> ancel	

Fill these in as is applicable and select Save;

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

Trai	ning 1 Sales - 0121 69	7 6500				_										
				Data P	rotect	ion										<i>.</i>
	lain   Customer   #	Additional Desired Vehicle Cont	act Vehicle	Allowabl	e Conta	ct Methods	5									
0	ontact Details -	Mr Phil Jones 🥔		Email	$\checkmark$	Mailshots	$\checkmark$	Phone	$\checkmark$	SMS	✓					
	Todays Contact															
S	alesperson	Pinewood Training	_	Vehicle (	Offers A	nd Service	5			1.1		1 67 11				0
C	ontact Category	Service	$\sim$	informed?	like to s	tay in touch	with you	J and keep	you up to	date with	i our latest product ne	ews and offers. Pleas	e indicate below no	w you wou	id like to be	kept
C	ontact Reason	Letter	$\sim$	Count		Meilebebe		04		CHIC						
C	ontact Method	Action	$\sim$	CITICII		Pidlishots		Prione		5195						
P	resent Vehicle	AS 2 Land Rover Discovery	$\sim$	Event In	vitation	s										<b>(</b> )
				From time	to time	we would lik	e to inv	ite our mos	valued of	ustomers	to attend VIP events	for new product laur	iches or special offe	r days. Tel	us how bes	t to invite
I	nbound/Outbound	Outbound	$\sim$	you to the	ese prest	igious events	\$7									
C	ustomer Status	Dealt	$\sim$	Email		Mailshots		Phone		SMS						
c	SI Rating	Please Select	$\sim$	Vehicle I	Manufar	turer										A
4 C	ontact Notes			To offer v	ou the b	est service p	ossible v	ve mav sha	re vou in	formation	with the Vehicle Man	ifacturer, who may v	vish to contact you a	about prod	ucts and ser	vices they
				offer. Plea	ise selec	t below whic	h metho	ds of conta	ct you we	uld like to	receive these offer o	n?				
				Email		Mailshots		Phone		SMS						
		tteles	d Documont													
		U pros	a pocument													
	uture Contacts															
	Date	Start Time End Time	Reas													
	17/05/2018	13:15	Enqu													
ШL																
				Created By						An	nended By					
													Sa	ve	Can	cel

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;



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	n - Train	ing Division	~	21/05/2018		•
Thursday	Friday	Saturday	Sun	day		Monday	Tues	day	Wednesday	
17 May	18 May	19 May	20	Hay		21 May	22 M	ay	23 May	
24.11-11	05 M	26 11-11	271	1 miles		20.11	20.11		20 Marc	
24 Hay	ZJ Play	20 Play		тау		zo may	23 P	dy	SUPPAY	
31 May	01 June	02 June	03 2	une		04 June	05 Ju	ine	06 June	÷,
07 June	08 June	09 June	10 3	une		11 June	12 Ju	ine	13 June	
			То	lay					Next	¥
Next Contact				Appointn	ients					
Customer	Mr Phil Jones			Start	End	Name	Cus	tomer Status	Contact Meth.	
Contact Category	Sales	~								
Contact Reason	Letter	~								
Contrast Mathead	Latter									
Contact Method	Letter	▼ Ξ								
Letter	Service Reminder			Activities	;					
Contact Duration	11 🗸 15 🗸 - 11	✓ 15 ✓								
				Handover		$\checkmark$				
	Discussed Testsian									
User	Pinewood Training									
Contact Notes	1,000 characters remaining									
L			v							
		I	Conta <u>ct F</u>	referenc <u>es</u>		Demonstrator J	Availability	Sav <u>e</u>	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;

Parts Invoice List			
Enquiry Reference Details			
	🛃 Pinnacle by Pinewood	>	
	Customer Information	Vehicle Information	
	Customer Mr Phil Jones	Make Land Rover	
Account Number CASHP	Company	Model Discovery	
Parts Information	Occupation	Specification Hse Sdv6 Auto	
Part No.	Address 395 Ringwood Road	Registration Number AS 2	
Quantity 0.00 Availability		Registration Date 18/07/2014	
		Body Colour	
	Post Town Poole	VIN SALLAAAGSEA715428	
	County	Engine Number 0816793306DT	EPC Availability View Part
	Postcode BH12 4LT	Notes	
	Telephone 01234 567890	Service	
	Mobile		
	Email testmail@mail.com	_	
	Add Vehicle Change Oustomer	Select a vehicle Accent Cancel	
	All tourse Should contour	Other of Tourise Decels opTrop	
		Invoice Price Check Deliver Order Re	call Enquiry <u>P</u> rint E <u>x</u> it

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 Jones Forename Company	Post Code Telephone Email Address	Reg No           VIN           Fleet No		
Search Results	Company	Address	Post Code	telenhone
Mr Bob Jones	company		i ost couc	recentione
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
Ar 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.

Nain Custome	Additional Desired Vehicle Contact Vehicles Service Details Deposits Ass	ociations Spend		
Customer Det	ails -			ש <b>f</b> in 8⁺ ייייי
Customer Inform	ation			
Title	Mr 🗸	Occupation		
Forenames	Steve	Job Title		
Surname	Jones *	Contact Name		
Company Name		Dear Name		
Address	2960 Trident Court	Personal Notes		
	Birmingham Business Park	Interests		
		Created By		
Post Town		Amended By		
County		Other Details		
Post Code	B37 7YN IN MPS	Intro Source	Aftersales *	
Country	United Kingdom	Account Name		
Email 1	support.portal@pinewood.co.uk	Customer Type	Private V	
Email 2		Department	Training 1 Sales *	
Email 3		Notes		
Association		1000 characters ren	naining	
Telephone Numb	ers			~
012169	Ext TPS Preferred Time			
l elephone 012105				
Mobile				$\sim$
Work	Please Select V			
Fax				
			Save	<u>C</u> ancel

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

Contact History will need to be added for the customer.

Main Customer	Additional	Desired Vehicle	Coniaci	Vehicles	Service Details	Deposits	Asse
Contact Details	- Mr Phil J	ones 🥔					
Todays Contact							
Salesperson	Pinev	vood Training					
Contact Category	Servi	ce		~			
Contact Reason	Lette	r		~			
Contact Method	Actio	n		~			
Present Vehicle	AS 2	Land Rover Discover	ry	~			
Inbound/Outbound	Outb	ound		~			
Customer Status	Deal	t		<b>~</b>			
CSI Rating	Pleas	e Select		$\sim$			
Contact Notes	Furth	er Action Required					
							$\sim$
			<u>U</u> pload Do	cument	<u>S</u> ave	<u>C</u> ance	

Fill these in as is applicable and select Save;

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

1	Fraining 1 Sales - 0121 697 6	Data Protection													
	Main Customer Ad	ditional Desired Vehicle Contact	Vehicle	Allowab	e Conta	act Methods	5								
	Contact Details - M	Ir Phil Jones 🛛 🥔		Email	~	Mailshots	~	Phone	•	SMS	<b>V</b>				
	Todays Contact			LITTON		T famorio co		1110110		0110					
	Salesperson	Pinewood Training		Vehicle	Offers A	and Service	5								6
	Contact Category	Service	$\sim$	We would	like to s	stay in touch	with you	and keep	you up to	o date with	our latest product news	and offers. Please in	dicate below how y	ou would lik	ke to be kept
	Contact Reason	Letter	$\sim$	momed	_		_		_		_				
	Contact Method	Action	$\sim$	Email		Mailshots		Phone		SMS					
	Present Vehicle	AS 2 Land Rover Discovery	$\sim$	Event In	vitatior	15									0
				From time	to time	we would like	e to inv	ite our mos	valued	customers	to attend VIP events for	new product launch	es or special offer d	ays. Tell us	how best to invite
	Inbound/Outbound	Outbound	$\sim$	you to the	ese prest	igious events	\$?								
	Customer Status	Dealt	$\sim$	Email		Mailshots		Phone		SMS					
	CSI Rating	Please Select	$\sim$	Vehicle I	Manufa	churer									0
4	Contact Notes			To offer y	ou the b	est service p	ossible v	ve may sha	re you in	formation	with the Vehicle Manufa	turer, who may wish	to contact you abo	ut products	and services they
				offer. Plei	ise selec	t below whic	h metho	ds of conta	ct you w	ould like to	receive these offer on?				
				Email		Mailshots		Phone		SMS					
		United F	acrumenir												
	Future Contacts		_												
	Date 9 17/05/2018	Start Time End Time 13:15	Rea: Engu												
				Created By						An	rended 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
	ASD Event
Category	Email
	Letter
Description	Please Select V
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	Commercial Bookings Due Commercial Unconfirmed Bookings	
-	Contract Expiry CSI Follow Up	
	Equipment	
	General Follow Up	
	MOT	
	Other Overdue Booking	
	Parts Awaited Parts Order	
	Recall/Campaign Benlacement Date	
	Scheduled Interval Check	
	Service Plan Expiry	
	User Defined Date 2 User Defined Date 3	
	Variable Servicing Warranty	<u>S</u> ave <u>C</u> ancel
	Work Required	

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;

General Contact Plans A/S Diary Priority Ca	mpaigns   Work Elsewl	here								
Contact Plans										
Aftersales Contact Reason			Actions							
Aftersales Contact Reason			Action			Lead Time	Rank			
Bookings Due			Days Before Due - First Contac	t Action - Email		30	1			
Contract Expiry			Days After Previous Action - SI	MS		10	2			
CSI Follow Up			Days After Previous Action - Le	etter		5	3			
Equipment			David Alex Description Article	nal Contact Action		14	4			
Finance	Pinnacle by Pinew	vood	×							
General Follow Up	Lead Time (Days)									
Insurance										
MOT	Contact Method	Letter	~							
Scheduled Interval Check	Lead Time	5								
Service	Select Letter	Consider UTML Afternoom Webserber								
Service Plan Expiry	Jucce Lotter	Service HTML Aftercare Wolverna	mi 🕈							
User Defined Date 2										
User Defined Date 3										
Warranty										
		Acce	pt <u>C</u> ancel							
			Add	A <u>m</u> end	Up	Down	Delete			

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									
2	Mrs Linda Charie		[⊒ Test Drive	✓ Presentat	ion 🗸	Appraisal 🗴	Quote 🗴	Busi	a se s Manager 🗴
Vehicles			Event		E	Due Date	Attem	ipts	
Porsche Boxster (981) s		^	Work Required - UNDERSIDE - EXHAUST SYSTEM CONDITION - cat to manifold bolts badly corroded 0.0 Warranty	0 Ø		03/10/2016		0	
K6 LEC		~	Sentce	8		08/05/2018		0	
			<u>V</u> iew Vehicle			✓			<u>F</u> ail
Today's Events:	1								<u>B</u> ack

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	8	30/09/2017	0	
Service		14/05/2018	0	
<u>V</u> iew Vehicle		✓ Bric	255	<u>F</u> ail
				<u>B</u> ack

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

GDPR

Event	Aftersales	Due Date	Attempts	
мот	$\otimes$	30/09/2017	0	
Service		14/05/2018	0	
View Vehicle		✓ Proce	55	<u>F</u> ail
				<u>B</u> ack

#### If you then clock on the 🛛 🖾 icon, you can view what permissions have been allowed;

Aftersales Diary				
Pinnacle By Pinewood … ×				
Data Protection				≥ø
Allowable Contact Methods				
Email 🗶 Mailshots 🗶 Phone 🗸 SMS 🗸				
Vehicle Offers And Services 0		Due Date	Attempts	
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 K Malehoto K Dhono K CMC K	$\otimes$	30/09/2017	0	
		14/05/2018	0	
Aftersales 0				
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 K Mailshots K Phone K SMS K				
Partner Integration 0				
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 🕊				
		✓ Press	G255	<u>E</u> ail
				<u>B</u> ack

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;

my work > Sales Process	
Customer	T,
Miss Anya Jones	<b>⊠</b> ¢
Todays Contact	>
	v
Upload Document Create New	v <u>O</u> pportunity

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.

My Wor	🦲 Pinna	cle By P	inewood						×			
Custome	Data P	rotect	ion								1	
-	Allowab	le Conta	act Methods	;								
	Email	$\checkmark$	Mailshots		Phone		SMS	$\checkmark$			E	¢
	Vehicle	Offers A	and Services	;					Ð			
	We would	l like to s	tay in touch	with you	u and keep	you up to	o date with	our latest	product news and offers. Please indicate below how you would like to be kept			
Todays C	Email		Mailchote		Phone		CMC	2			`	~
Contact Rea	Lindi		Pidilatioca		FIIOIIC		3113	Ŀ		~		
Contact Me	Event Ir	vitation	ıs						0	~		
Inbound/O	From tim you to th	e to time ese prest	we would lik igious events	e to invi ?	ite our mos	t valued	customers	to attend \	/IP events for new product launches or special offer days. Tell us how best to invite			
Customer S	Email	$\checkmark$	Mailshots		Phone		SMS	$\checkmark$				
New Oppo	Dartmor	Docaria	tion						٩			
	To give y	ou the b	est possible s	ervice, v	we will som	etimes sl	nare you da	sta with ou	r partners who may wish to contact you about their latest products and services.			
	You can s	pecify b	elow how you	ı would	like to recei	ve these						
	Email	$\checkmark$	Mailshots		Phone		SMS	$\checkmark$				
												Ň
										Upload Document	Create New Opportuni	ity

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

My Work > Sales Process		Ø
Customer		≡ ∧
Miss Anya Jones	Presentation 🗴 Appraisal	X Quote X Business Manager X
Desired Vehicle		>
Test Drive		>
Video		>
Part Exchange		>
Offers And Orders		>
Next Contact		>
	Lost Sale	₩y Work

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;



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

/ehicle All								
		~	Start Date	DD/MM/YYYY				
Jser All		~	End Date	DD/MM/YYYY	Group By	Flat View	~	<u>S</u> earch
inewood				New Opportunity : New Opp	ortunity Create	d. Contact Preferences Updat	ted	
Inbound S	howroom							

# 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;

Pinnacle By	Pinewood						
Data Prote	ction						
Allowable Cor	itact Methods	;					
Email 🗹	Mailshots	$\checkmark$	Phone	$\checkmark$	SMS	$\checkmark$	
Vehicle Offers	And Services	5					6
We would like to informed?	o stay in touch t	with you	and keep	you up to	date with	our lates	t product news and offers. Please indicate below how you would like to be kept
Email	Mailshots		Phone		SMS		
Aftersales							G
It is important t of all the key se	hat you ensure rvices your vehi	your ve icles ner	hicle is road eds	lworthy a	it all times.	Knowing	when your car needs attention is sometimes difficult. Would like us to remind you
Email 🗌	Mailshots		Phone		SMS		
Partner Integ	ration						đ
We will share yo the contact met	ur data with ch hod preference	nosen pa s/	artners to er	nsure you	receive th	ie best po	ssible service and offers that will be of interest to you. Please consent below using
Email 🗌	Mailshots		Phone		SMS		

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 t	hen continue to	the bo	oking c	confirmatic	n screen.
			. 0.		

<ul> <li>Pinnacle by</li> <li>Confirmation</li> </ul>	rinewood Aessage	×	
0 of 20000 used Message Contact Mobile Email 1 Email 2	Porche Centre Welverhampton: Your velicle is booled in at Persche Centre Welverhampton on I Send TPS Registeree 441234567891	d	
Email 3 Introduction Sou	ce Auto-trader V		

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;

Job Progress Job		C D Q T B
In	Work In Progress	Out
Vehicle Arrived Not Received	Not Started	Completed
Jobs Not Arrived	Work In Progress	Costed
	Awaiting Authorisation	Contacted
G L Mastics Ltd	On Hold	
' BL16 КZК 09:00 тты	Resume	
G L Mastics Ltd	Quality Control	
		v

#### Selecting the Amend Job option to amend the booking;

In		
Vehicle Arrived Not R	eceived	
Jobs Not Arrived		
<ul> <li>Bookings Not Arrived</li> </ul>		2
G L Mastics Ltd BL16 KZK 09:00		ana Re
Porsche Panamera S E Company: G L Mas Customer: Mr Gary In: 09:00 17/11/20 Out: 14:00 17/11/20 Tag:	: Hybrid tics Ltd Lakin 16 <b>B:</b> Sarah Bishop 16 <b>R:</b> <b>S:</b>	
Operation: Load Hours: Account: Description:	2 0.47 POR01 (Porsche cars GB Ltd s Re-program DME control units Information System for detail	Customer
Operation: Load Hours: Account: Description:	3 0.00 CASHS (Service Retail Cash Sa supply insured courtesy car do to supply valid driving licence	Arrived Job Details
G L Mastics Ltd BD16 UCV 09:00		Amend Job Amend Job
		Invoicing Change Status Email Booking Conf

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     Company       Address     2960 Trident Court       Post. Town     Postcode       Telephone     01216976500       Mobile     Vertice	Make     Audi       Model     A1       Specification     Black Edition 1.4 TFSI 150 PS       Registration Number        Registration Date     17/07/2014       VIN     Engine Number	Service Warranty MOT Service Plan Expiry Brake Fluid Change Warranty4Life Due
Account Number CASHP Parts retail cash account	Crder Number	

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

Data P	rotect	ion						
Allowab	le Conta	ct Methods						
Email	$\checkmark$	Mailshots	✓	Phone	✓	SMS	$\checkmark$	
Marketi	ng Camp	paign						0
We would marketing	d like to s g commu	tay in touch nications fror	with yo n either	u to keep yo r of the met	ou up to o hods belo	date with w, please	our latest pro indicate this	duct news, marketing services and offers. If you would like to receive future by ticking the relevant box.
Email		Mailshots		Phone		SMS		
Marketi	ng Sales	i						đ
Would yo	u liked to	be contacte	d on th	e new sales	?			
Email		Mailshots		Phone		SMS		
Ford								6
Ford Mote	or Compa	any may requ	ire you	r informatior	n to enab	le a range	e of commun	cations and services that enable you to get the best from your Ford.
Email		Mailshots		Phone		SMS		
Volvo Ca	ars							6
Volvo Car	rs may re	quire your in	formatio	on to enable	e a range	of commu	unications an	d services that enable you to get the best from your vehicle.
Email		Mailshots		Phone		SMS		
Created By	/					A	mended By	
								<u>S</u> ave <u>C</u> ancel

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	17/08/2017 14:55
Vehicle Order Cancelled	
Pinewood (ML) Outbound - Car Stores VM	17/08/2017 14:54
Vehicle Order Cancelled	
	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

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 I 🕖 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.       Based on information we hold against your record, we will invite you to events that may be of interest to you, this could include we hick launches, or specific VIP events.         Email I Mailshots I Phone I SMS I       SMS I									
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 Invitation	s			0		
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 Descript	tion			0		
To give you th products and s	e best possible s ervices. You can	service, we will s a specify below h	sometimes share you data with our partners who may wish to contact you about their la how you would like to receive these	test		
Email 🗹	Mailshots 🗌	Phone 🗌	SMS 🗹			
			u	Jpdate		

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.

Please update prefere	visit link below to view/ e your contact ences	
goo.gl		

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

Further details are available in our <b>Privacy Policy</b> . 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 I icon to view the additional details held against the question.

Vehicle O	ffers and Services
We would up to dat Please in informed	I like to stay in touch with you and keep you e with our latest product news and offers. dicate below how you would like to be kept ?
Email	
Mailshots	
Phone	
SMS	
E Based record of inte launch	on information we hold against your , we will invite you to events that may be rest to you, this could include vehicle es, or specific VIP events.
launches you to th	or special offer days. Tell us how best to invite ese prestigious events?
Email	-
Mailshots	
Mailshots Phone	

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.