CRM That Makes A Difference

GDPR Guide

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Introduction

The following Guide describes the changes we have made to Gold-Vision to help you prepare for GDPR.

Definitions

GDPR definitions

Data Protection Impact Assessment (DPIA) helps organisations to identify the most effective way to comply with their data protection obligations and meet individuals' expectations of privacy.

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulationgdpr/accountability-and-governance/data-protection-impact-assessments/

You may need to do this if you undertake large-scale data processing or record special categories of data. If you don't need to carry out a DDIA you will need to look at conducting a data audit.

https://ico.org.uk/for-organisations/resources-and-support/data-protection-self-assessment/

Privacy Notice – this holds information that you direct people to. It tells them about the categories of data you hold, how long you'll keep it, the lawful basis for processing etc.

https://ico.org.uk/for-organisations/resources-and-support/getting-ready-for-the-gdpr-resources/

GV definitions

Purpose - Record why, how long you store personal data for and the lawful basis for processing personal data according to ICO Article 6

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basisfor-processing/

Privacy Rules - Set up automated system rules to apply the purposes you have created.

Privacy Log – this is a Gold-Vision object that holds any Privacy rules applied and also requests made by each data subject (Contact/Lead)

Privacy Notice Provided– records that a Privacy Notice has been provided. This can be triggered by a Rule applied individually or to a Campaign Stage.

Personal Data - GDPR applies to 'personal data' meaning any information relating to an identifiable person who can be directly or indirectly identified in particular by reference to an identifier.

Sensitive Data GDPR refers to sensitive personal data as "special categories of personal data" specifically this includes genetic data, and biometric data where processed to uniquely identify an individual.

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basisfor-processing/special-category-data/

Fields in Gold-Vision can be marked as personal or sensitive using the screen designer.

First Name Title Account Field First Name Contact Phone FIRST NAME a Last Name Standard Field Job Title Email 1	×
Details Tooltip: Title Account Field: First Name Contact Phone FIRSTNAME Last Name Mobile Phone Standard Field Job Title Email 1	×
Field: First Name Contact Phone FIRSTNAME	
FIRSTNAME B FIRSTNAME B Standard Field B Stan	×
Type: Job Title X Email 1	×
Standard Field	~
Privacy Options:	
Not Set Sensitive Personal Business	

Subject Access Requests

Individuals have the right to access their personal data and supplementary information. The right of access allows individuals to be aware of and verify the lawfulness of the processing.

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/individualrights/right-of-access/

Erasure Requests

The broad principle underpinning this right is to enable an individual to request the deletion or removal of personal data where there is no compelling reason for its continued processing.

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/individualrights/right-to-erasure/

Expired Records

Records where the duration for the purpose for holding the data has expired. For example, you might hold prospect data for 2 years, at the end of 2 years the record will be marked as an Expired item.

Deleted Items

Deleted Gold-Vision records can be undeleted by an Administrator.

Erased Items

Records will be permanently removed from the data base and cannot be undeleted.

Help Resources

Access to privacy settings

Access to privacy settings are managed in User access options.

Your Data Protection Officer or person responsible for data will need access to the Privacy Admin

menu in the Admin Console.



Dashboard page includes set up steps and data to review.

Setup

- Identify Personal Data Use the <u>screen design</u> tool to mark personal/sensitive field data.
 Define Data Purposes Record why and how long you store personal data in <u>purpose</u> area.
 Configure Privacy Rules Set up automated system rules to apply purposes in the <u>privacy rules</u> area.
- 4. Monitor and Manage Process Subject Access Requests, Erasure Requests and remove old data.

Privacy Log	
✓ Access	

Contact 🗸										Edit	Un	do	Clos	e
Title					M			Account:	Aardv	ark IIIs				0
First Name	Fred						Conta	act Phone:	01202	2828444				Ð
Last Name	Test						Mob	ile Phone:						9
Job Title								Email 1:	fred@	est.com				
Privacy Log 🗸														
A	•					A 1	*		•				-	
Event Date Event		User Name		Purpose		Lawful Ba	asis	Duration		Removal D	ate	Notificat	tion	
	Q		Q		Q		Σ۹		Σ۹		Q	All		~
27/02/2018 0 Account	Rule	Nikki Bugla		Purpose A		Consent		30 Days		29/03/2018	0	-		

Note - all users have access to Privacy Actions: (see below for more details)



Users with access to Privacy Log will also have the Renew Removal Dates option:



Contact 🗸			\odot		Edit Ur	ndo Close
Title:	М	W		Account: Aligat	or Fonts	- C
First Name:	Chris		Conta	act Phone: +44(0)1234 444 444	2
Last Name:	Rich		Mob	ile Phone:		Ð
Job Title:				Email 1: test1(@test.com	
Privacy Log 🗸						
A V A	T	A V				
Event Date Event	User Name	Purpose	Lawful Basis	Duration	Removal Date	Notification
۹ ا	Q	Q Q	. Σ 🔍	Σ۹	۹.	All 🗸
07/03/2018 1 Account	Rule Nat Gorton	Customer	Contract	3 Years	06/03/2021 1	-

Setup steps

Select Dashboard form the Privacy menu – this outlines the setup steps for you to follow:

Setup





Step 1: Use the screen designer to mark Sensitive/Personal field data

Details	Advanced	Layout				
Screen La	bel:	Heade	r			
First Name	8					
Details To	oltip:		Title	×	Account	×
Field:		- 🗖	First Name	×	Contact Phone	×
FIRSTNA	ME	A	Last Name	×	Mobile Phone	×
Type:			Job Title	~	Email 1	~
Standard I	Field	<u>.</u>	JUD THE	^	Email 1	~
Privacy O	ntions:					
O Not S	et O Sensitive Personal	Busine	955]		
Mandator	y: New Existing		Business Address	×	Email 2	×

Note: when records are erased, this is the data which is permanently removed from the database.

Only use sensitive for the special categories of data.

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basisfor-processing/special-category-data/

Step 2: Define Data Purposes

Record why and how long you store personal data (as per your Privacy Policy)

New Purpose		
Description:	Lawful Basis: Not Set	✔ @
Duration: Not Set		Active:
Save Cancel		

Add a description.

Set the **Lawful Basis** for processing personal data according to ICO Article 6 <u>https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/lawful-basis-for-processing/</u>

Lawful Basis:	Not Set	6
	Consent	
	Contract	
	Legitimate Interest	
	Legal Obligation	
	Vital Interests	
	Public Task	

Note: these can be added to in the screen design, if for example you are processing sensitive data, see Article 9 <u>https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-</u> gdpr/lawful-basis-for-processing/special-category-data/

Set the **Duration** from the drop down:

Duration:	Not Set
	30 Days
	60 Days
	90 Days
	6 Months
	9 Months
	1 Year
	18 Months
	2 Years
	3 Years
	4 Years
	5 Years
	6 Years
	7 Years
	8 Years
	9 Years
	10 Years

Example:

New Purpose				
	Description: Inbound Marketing		Lawful Basis: Legitimate Interest	
	Duration: 1 Year	\checkmark		Active:
Save Cancel				

Step 3 Configure Privacy Rules

Set up automated system rules to apply purposes in the privacy rules area.

New Privacy Rule Rule Name: Rule Type: Not Set Purpose: Not Set Notification: Active: Save

Set the Rule Type

Rule Type:	Not Set
	Account Rule
Purpose:	Interaction
	Leau List

1. Account Rule

This allows you to apply a purpose to contacts based on the account type (relationship). Select the appropriate drop field for your system and choose one of more options for each rule.

			Example:		
Jpdate Privacy Rule			Update Privacy Rule		
Rule Name:	Customers		Rule Name:	Prospects	
Rule Type:	Account Rule	~	Rule Type:	Account Rule	~
Account Dropdowns:	Account Type 1	~	Account Dropdowns:	Account Type 1	~
Rule Options:	Customer Distributor Government Body Live Prospect Partner Prospect Reseller Supplier Suspect		Rule Options:	Customer Distributor Government Body Live Prospect Prospect Reseller Supplier Supplier	
Purpose:	Customer	~	Purpose:	Business Development	~
Privacy Notice Provided:			Privacy Notice Provided:		
Active:	\checkmark		Active:	\checkmark	

2. Interaction

This allows you to apply a purpose to Contacts based on their behaviour – for example: when they make a purchase or attend an event. (Note: Event Attendee functionality is not available in 7.1.8, but will be in 7.1.9)

New Privacy Rule

Rule Name:		
Rule Type:	Interaction	\checkmark
Integration Dropdowns:	Not Set Event Attendee	
Purpose:	Opportunity Won Quote Won	
Notification:		
Active:		

3. Lead List

This allows you to apply a purpose to a lead based on the Lead List Type. You can set up Lead List Types using the screen design tool (Listcontrol)

Select the lead list type then select the purpose to be assigned to this rule.

Update Privacy Rule		
Rule Name:	Inbound - online	
Rule Type:	Lead List	~
Rule Options:	☐ Inbound call ✓ Live Chat on Web Site ✓ Web Forms	
Purpose:	Business Development	~
Privacy Notice Provided:	\checkmark	
Active:	\checkmark	
Save Delete Cancel		



Privacy Notice Provided

Tick this option if a Privacy Notification would have been provided – for example a link on a web sign up form.

Bulk Run Privacy Rules

Option to update all existing records – this will update all records with the relevant rules. Note all dates set will be based on the created date of the item NOT the date the bulk update is run.

Privacy Rules List	New
Bulk Run Privacy Rules	

Step 4 Monitor and Manage

Process Subject Access Requests, Erasure Requests and remove old data.

Review			
0	-	~~	-
0	×	0	
3	2	0	2
Access Requests	Erasure Requests	Expired Records	Deleted Items

Subject Access Requests - Individuals have the right to access their personal data and supplementary information.

If a contact a requests access to their personal data this can be actioned in the contact record:

Pfinu	
Privacy Actions	Renew Removal Dates
Make Dormant	Log Erasure Request
Delete	Log Subject Access Request
Close	Privacy Notice Provided

Calum RAAA

The request will be logged against the contact or lead record in their Privacy Log

Contact 🗸				٩	\bigcirc				Edit	Un	do C	lose
	Title:			W			Account:	Aardv	ark Ills			
First I	Name: Fred					Conta	ict Phone:	01202	828444			9
Last	Name: Test					Mob	ile Phone:					9
Jot	b Title:						Email 1:	fred@	test.com			
Privacy Log 🗸												
A -	* *					,	A .	Ŧ	* *		A .	~
Event Date Ev	/ent	User Name	Purpose		Lawful Bas	sis	Duration		Removal D	ate	Notificatio	n
Q	Q		٩	Q	1	Σ 🔍		Σ۹		Q	All	\sim
27/02/2018 1 Su	ibject Acce	Nikki Bugla	-		-		-		-		-	
27/02/2018 0 Ac	count Rule	Nikki Bugla	Purpose A		Consent		30 Days		29/03/2018	0	-	
4	44		4			Þ			DD		ÞI	



The request can then be actioned by person responsible for data from the Administration Console. Under Article 12: you should process the request "without and undue delay" and within one month.

Subject Access Requests

C							
A . T	A	•	A . T			A . T	
Summary	Requested Date	~	Requested By	~	Access Request	Complete	
	Q Select a date			Q		No	~
Fred Test	27/02/2018 10:35:	05	Nikki Bugla				
M	44	4		Þ	ÞÞ	ÞI	

Gold-Vision Message					
Export Privacy Data					
Export Personal Sensitive Data Export Privacy Log Export Notes					
Ok					

Export Personal Sensitive Data

CSV file with contact name (summary) and all fields which have been marked as personal or sensitive. **Note**: the fields marked as Personal or Sensitive are the fields which are erased.

	А	В	С	D	E
1	Summary	First Name	Last Name	Birthday	Email 1
2	Fred Test	Fred	Test		fred@test.com
3					

If there are personal or sensitive fields stored in other Gold-Vision items, such as profiles or opportunities, they will also be listed.

Export Privacy Log

CSV file containing your lawful basis for processing, purposes and planned removal date.

Date	Event	Purpose	Lawful Basis	Planned Removal	
27/02/2018 10:59	Personal S	ensitive Da			
27/02/2018 10:35	Subject Ac	cess Reque			
27/02/2018 09:52	Account R	Purpose A	Consent	29/03/2018 09:52	

Export Notes

CSV file of notes relating to the contact or lead.

Erasure Requests

Erasure Requests:	All 😵								K Erase	٩I
	× •		🔺 🔻		A 7				A 7	
Summary			Requested Date	~	Requested By	~	Erase	Requ	est Comple	ted
		9	Select a date	0		Q		No		~
Joe Bloggs			13/03/2018 15:56:57		Nikki Bugla		×		-	
Bob Geldof			13/03/2018 15:55:01		Nikki Bugla		×		-	
14	44	4	Þ			$\Diamond \Diamond$		Þ		
Records 1 to 2 of 2										

Contacts will be permanently removed from Gold-Vision and the database

Expired Records

Removal Dates are there to show when a contact or lead has gone passed the original retention period that was applied based on the Privacy Rules. This does not mean that the data is removed automatically - or that you should not keep the contact or lead in Gold-Vision. It does give you the opportunity to review the data, check the lead or contact are still interested in your products or services or indeed, still an active customer.

Ideally, you would review your data before the removal date was reached so that your Privacy Administrator can keep your data no longer than is necessary. (article 5.5)

Removal review list.

Shows contacts and leads whose removal date has passed as well as deleted or dormant contacts.

Filter this list as required to bulk erase.

	Removal Review List: All					×	Erase All		
	A 🔻		▲ ▼	A 7	A				
	Summary		Removal Date	Deleted	Dormant	Erase			
1		Q	Today and Before	All 🗸	All	~			
	a contact		08/03/2018 13:49:58	×	-	×			
	IA 44 4		Þ	ÞÞ		ÞI			
	Records 1 to 1 of 1								

Deleted Items

The Removal review list shows all records marked as deleted or dormant as well as contacts whose removal date has passed. Filter the list to show only deleted contacts or leads. Records can be erased individually or in bulk.

Removal Review List: All	\$								¥ Erase All	
	A			▲ Ψ	A 7		A 7			
Summary				Removal Date	Deleted	Dorma	ant	Erase		
			Q,	Select a date	e Yes	V All	, ,	·		
a contact				-	~		-	2	ĸ	
Paul Daniels				-	~		-	2	ĸ	
М	44	4		Þ				M		
Records 1 to 2 of 2										

Note: there is a now a Bulk Delete option in all lists in Gold-Vision (available under the same access options as Bulk Replace)



Any contacts deleted will appear in the removal review list and can be erased from the system.



Privacy Actions

All Gold-Vision users will have access to Privacy Actions.

Contacts			Leads						
Privacy Actions	•	Renew Removal Dates	Lead +						
Make Dormant		Log Erasure Request	Print Call Call Back						
Delete		Log Subject Access Request	Status / Outcome: 1 of Selog Erasure Request						
Close		Privacy Notice Provided	List Name: Web Log Subject Access Request) 18						
ciose			Privacy Notice Provided						

Note: If you do not have access to the Privacy Log (in user Access Options) you will not have access to the Renewal Removal Dates option.

Renew Removal Dates

Within the Privacy Actions, you can extend the retention of your leads and contacts as this reapplies the Account Rules(s) or Lead List rule.

Renew Removal Dates
Log Erasure Request
Log Subject Access Request
Privacy Notice Provided

Note access to the Privacy Log is available in user access options.

Privacy Log 🗸								
* *	* *	* *	A V	A T	× •	A V	A 7	
Event Date	Event	User Name	Purpose	Lawful Basis	Duration	Removal Date	Notification	
۱ ۹	Q	Q	Q	Σ۹	Σ 🔍	Q	All	\sim
12/03/2018 11:12:49	Account Rule	Nikki Bugla	Customer	Contract	3 Years	11/03/2021 11:12:49	-	
12/03/201511:12:09	Account Rule	Nikki Bugla	Customer	Contract	3 Years	11/04/2018 11:12:09	-	
14	44		4	⊳		$\Diamond \Diamond$	ÞI	

Log Erasure Request

The right to erasure is also known as 'the right to be forgotten'. The broad principle underpinning this right is to enable an individual to request the deletion or removal of personal data where there is no compelling reason for its continued processing.

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/individualrights/right-to-erasure/

If a contact or lead requests that their data be removed from your Gold-Vision, this can be done by logging an Erasure Request:

Privacy Actions	Renew Removal Dates
Make Dormant	Log Erasure Request
Delete	Log Subject Access Request
Close	Privacy Notice Provided

Contact 🗸									Edit	Un	do Clo	se
Ti	le: Mr				Ø		Account	Accou	int Plover III		•	0
First Na	ne: Joe					Conta	act Phone:	12345	j			Ð
Last Nar	ne: Blogg	s				Mob	ile Phone:					Ð
Job Ti	le:]		Email 1:					
Privacy Log 🗸												
A 🔻		A V					·	-				
Event Date Event		User Name	P	ourpose		Lawful Basis	Duration		Removal Da	ate	Notification	
٩	Q		Q		Q	ΣQ		Σ۹		۹(All	\sim
12/03/2018 1 Remo	val Re	Nikki Bugla	-			-	-		-		-	
И	4	1		4		Þ			$\Diamond \Diamond$		ÞI	

The request will be logged against the contact or lead record in their Privacy Log. Note access to this is available in user access options.

This can then be actioned by your data administrator (see above). The data will be permanently deleted.

Note: if a contact is deleted, is can be undeleted in the Admin Console. Erased data cannot be brought back in to Gold-Vision.

Log Subject Access Request

Individuals have the right to access their personal data and supplementary information.

If a contact or lead requests access to their personal data this can be action in the contact record:

Plillic	
Privacy Actions	Renew Removal Dates
Make Dormant	Log Erasure Request
Delete	Log Subject Access Request
Close	Privacy Notice Provided
]

The request will be logged against the contact or lead record in their Privacy Log. Note access to this is available in user access options.

Contact 🗸						\odot				Edit	Ur	ndo (Clos	е
	Title:				1			Account	Aardv	ark IIIs				0
Fir	st Name:	Fred					Conta	act Phone	01202	2828444				3
La	st Name:	Test					Mob	ile Phone						1
	Job Title:							Email 1	fred@)test.com				
Privacy Log	•													
A -		Ŧ	A . T		•		-		Ŧ		r		Ψ.	
Event Date	Event		User Name	Purpos	е	Lawful B	asis	Duration		Removal [Date	Notificat	ion	
٩		Q		Q	Q		Σ٩		Σ٩		Q	All		\checkmark
27/02/2018 1	Subject A	cce	Nikki Bugla	-		-		-		-		-		
27/02/2018 0	Account F	Rule	Nikki Bugla	Purpose	eΑ	Consent		30 Days		29/03/2018	B 0	-		
14		44		4			⊳			DD		ÞI		



The request can then be actioned by person responsible for data from the Administration Console. Under Article 12: you should process the request "without and undue delay" and within one month.

https://ico.org.uk/for-organisations/guide-to-the-general-data-protection-regulation-gdpr/individualrights/right-of-access/

Your data administrator will be able to send the data you hold about them (see above)

Privacy Notice Provided

A user might have advised the contact or lead about your privacy policy whilst on the phone, this can be recorded in Gold-Vision, against the Contact or the Lead.

Renew Removal Dates
Log Erasure Request
Log Subject Access Request
Privacy Notice Provided

vacy Notice was provided:
×
Apply Privacy Notice Provided Cancel
ri

This action will be displayed in the Privacy Log

Priv	acy Log 🗸								
			T	A. V.	A . V		A. V.		
Ever	Notified o	ontact, method: phone	ie	Purpose	Lawful Basis	Duration	Removal Date	Notification	
	Q	Q	_ <	٩	Σ۹	Σ۹	Q	All	\sim
12/03	3/2018 1 N	lotified cont Nikki Bug	la	-	-	-	-	 Image: A set of the set of the	
12/03	3/2018 1 R	emoval Re Nikki Bug	ıla	-	-	-	-	-	
	И	44		4	⊳		$\Diamond \Diamond$	ÞI	

Privacy Log

The Privacy log documents rules which have been applied to the contact or lead, erasure requests, subject access requests and privacy notices that have been provided.

Note access to the Privacy Log is available in user access options.

Contact

Business 🗸	Privacy Log	•									
Details	A V	A . V	A V					Ŧ			T
	Event Date	Event	User Name	Purpose	Lawfu	ul Basis	Duration		Removal Date	Notificat	ion
Appointments	Q	Q		L	Q	Σ 🔍		Σ۹	۹ م	All	~
Activities	12/03/2018 1	Subject Acce	Nikki Bugla	-	-		-		-	-	
Activides	12/03/2018 1	Removal Re	Nikki Bugla	-	-		-		-	-	
Profiles Town/Ci	12/03/2018 1	Account Rule	Nikki Bugla	Customer	Contr	act	3 Years		11/03/2021 1	-	
Campaigns 🕐 a	N	4	1	4		⊳			ÞÞ	ÞI	
Seminars Zip Coc	Records 1 to 3 of 3										
Touch Points											
Links											
Documents g											
Emails Catego ie											
Notes											
Privacy Log											

Lead

Lead 🗸								Edit	Undo
🖂 Email 🛛 🔊 Call	🖪 Call Back 🧕	Re-assign 🍠	Promote	🔊 Discar	d 👗	Enrich	👢 Prospects	s 🗙 (Delete
Status / Outcome: Not Set Find other Contacts at Gold-Vision									
List Name: Web requests Last Action: 12/03/2018 12:41:36 by Nikki Bugla									
✓ You are the owner of this record.									
 Details 									
Summary:	Gold-Vision (Holly Tree)	۵		Contact	Firstname:	Holly			(
Company Name:	Gold-Vision			Contact	t Lastname:	Tree			
Phone:			D	Con	tact Phone:				1
Web Domain:			6	Con	tact Mobile:				1
Postcode:			<u>ič</u> .	Cor	ntact Email:				0
 Notes 									
 Privacy Log 									
A 🔻 A	* A *	A . .		A T			A 7		-
Event Date Event	User Name	Purpose	Lawful	Basis D	Duration		Removal Date	Notificati	on
٩	٩	Q	Q	Σ 🔍		ΣQ	q	All	~
12/03/2018 12:4 Lead List	Nikki Bugla	Business Develo	Legitin	ate Interest 1	Year		12/03/2019 12:4		/
М	44	4		Þ		1	>Þ	ÞI	
		Recor	ds 1 to 1 c	f 1					

Best Practice

Privacy Notices

Q. Do I have to provide a Privacy Notice (Right to be informed) to my existing Contacts and Leads?

A. You can ask for clarifications from the ICO. Current opinion is that you do, and it is good practice.

Q. How do I show I've sent a Privacy Notice?

A. Gold-Vision documents this for you in the Privacy Log.

• You can use Campaigns and once the stage has been run go to Campaign Stage \rightarrow Privacy Notice Provided \rightarrow Apply Privacy Notes Sent to Recipients

Ca	ampaignStage 🗸			
	Run Su	mmary	Test	
,	Refresh Recipients	Media	Email - Connect	\checkmark
1	Follow-Up Stage		Newsletter	\checkmark
	Copy Stage		Nikki Bugla	0
0	Export	•		
	New Link			
	Privacy Notice Provided 🕨		Apply Privacy Notice to Sent Recipients	;
C	reate Sollow-Up Act	ivities	No follow-up Activities	

- New leads from inbound marketing may have been provided with a Privacy Notice so use a Lead list rule for this.
- If you individually provide a Privacy Notice, you can record this from the Privacy Action menu on a Contact or Lead

Рин						
Privacy Actions	Renew Removal Dates					
Make Dormant	Log Erasure Request					
Delete	Log Subject Access Request					
Close	Privacy Notice Provided					
Privacy Notification n						
Enter how the Privacy Notice was provided:						
Apply Privacy Notice Provided Cancel						

Q. Can I automatically email a Privacy Notice using Alerts?

A. If you are using your own SMTP Settings [Tools-> Administration, Settings-> SMTP Settings], you can set up an alert on Contacts and Lead Lists to send an email on creation.

If you are a Hosted customer and have not entered your own SMTP Settings, the email would come from 'Gold-Vision' and therefore is not suitable for this (as its purpose is to inform the data subject that you are the Data Controller).

The best solution is to use Marketing Automation for this regular task. This will be available in a later release.