



GDPR / Privacy Portal User Guide



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INTRODUCTION

The aim of this document is to assist you with the set-up process for your new privacy portal. If you wish to know more about what is included in this product release and gain a better understanding of the new features; it may be worth first reviewing our release notes.

Portal Configuration

Set Up Steps

To make the set-up process as simple as possible we are providing three sets of instructions. Most intermediaries will be able to follow the simple instructions in setup path 1, however for larger firms, groups of firms or more advanced setups can use setup path 2 and 3.

In each case the steps to get your portal live are as follows

- 1. Set up one or more portals
- 2. Add an introductory paragraph to display at the top of your portal
- 3. Configure your consent questions for each portal
- 4. Configure your email templates for single client requests
- 5. Configure your email templates for bulk consent requests
- 6. Add links to all of your DPA and GDPR statements
- 7. Begin using the new functionality to gather consent Firstly, you need to determine which instruction set to follow.

Setup Path 1 - Simple One Brand set up

Follow these instructions if you are a straightforward business operating under a single trading style. This path will also be suitable if you are part of a group of companies where each company has its own separate 360 database.

We expect these instructions to suit the vast majority of businesses.

Setup Path 2 - Simple Multi Brand Setup

If you operate multiple trading styles within the same 360 Database and each trading style operates largely independently of other, then this is the path for you.

Setup Path 3 - Advanced Setup Procedure

A complete service then this is the path for you. Usually this is where there is a group of companies with similar names, for example, Sprogget & Sylvester – Wealth and Sprogget & Sylvester – Mortgages might want to share a single Sprogget & Sylvester Portal.



DETAILED PORTAL CONFIGURATION

Setup Path 1 – Simple one brand set up

Set up a portal

Firstly, log into 360 Lifecycle – Office and go to the maintenance tab. From the compliance menu there is a new item named "Privacy Portal Configuration". Clicking this will show another menu item name "Portal Setup".

You will be presented with the screen shown in Figure 1.

Choose Single Brand Portal and click "OK". You will be presented with the following portal set up screen:

Portal Setup	x
© Single Brand Portal	Every Brand will be assigned to one Portal
© Portal Per Brand	Each Brand will be assigned to its own Portal
© Advanced	Configure each Portal individually
	OK Cancel

Figure 1- Portal Setup - Helper

🔜 Portal Setup		x
Add Save All Delete		
* New Portal	Title New Portal Short Name URL https://dientportaltest.360lifecyde.co.uk/ PortalLogo Portal Theme Additional Information Links Title URL Add Remove	
	Title URL	

Figure 2 – Portal setup



Enter the title of your portal. Typically, this will be your company name.

Now choose a Short Name, this is a small piece of text that is included in the URL of the portal. This allows the system to display the correct branding for your business. As it also forms part of the URL your clients can have more confidence that they are going to the correct place.

Next choose a portal logo. This will normally be the same one you use to display on Reports. Should you need to upload a different Logo you can do so here.

Your portal comes preconfigured with a number default themes or styles. Choose a theme that most closely matches your brand image and one where your logo does not clash with the colour scheme. There is a preview button here so you can have some idea what each theme and colour scheme look like. Don't worry you can always come and change this later if you need to.

🖳 Portal Setup		-		x
G H X				
Add Save All Delete				
* Sprogget and Sylvester	Title Sprogget and Sylvester Short Name sands URL https://dientportaltest.360lifecycle.co.uk/sands PortalLogo LOGO.jpg Portal Theme Flatty Additional Information Links			
	Title URL Add	Remo	ve	
	Title URL			٦

Your screen should now look something like this.

Figure 3-Portal Setup Complete

Hit the Save button and you are done. You can now close this screen.



CONFIGURE YOUR CONSENT QUESTIONS

A new series of menu items will have now been added to the menu to allow you to further customise the portal you just configured.

Click the "Portal Content" menu item.

	Best Practice Manager Competency Levels Marketing Permissions			
	Privacy Portal Configuration			Portal Setup
_	P	ortal Content		Sprogget and Sylvester
	Email Template - Advisor Request		_	
Ļ	E	mail Template - Bulk Request		

Figure 4- New Portal Menu

You will be presented with the following screen.

Go ahead and enter an introduction. Again, don't worry if you don't get this right first time, you can always come back and change it later.

💀 Portal Content - Sprogget and Sylvester	-		x
Settings Questions			
Save Preview			1
Introduction As you are no doubt aware Data Privacy Laws in the UK and Europe are being radically overhauled. This is why you will have had a flurry of emails in recent week	s asking you to		
confirm your consent to remain on various mailing lists.			
The following section outlines our Data Processing activies, basically, how we use your data to help provide you with advice and other services.			
Please review the items below and in each instance, confirm whether or not you are happy for us to proceed.			
Additional Information Links			
Title		_	1
URL			i I
bbA	Remov	/e	i





Now go to the second page titled "Questions" and click the Add button on the toolbar.

Go ahead and type in the details of the consent question you wish to ask of your clients and click save. At this point your screen should look something like this....

💀 Portal Content - Sprogget and Sylvester	_ = ×
Settings Questions	
Add Save Delete Preview	
Title	Title
T Monthly Noundatton	Monthly Newsletter
	Explanation
	We would like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. Typically this will include details of Special Offers Exclusive Deals Housing Market Information and much more
	Show Consequences?
	O Yes
	Marketing Permissions? () Yes () No

Figure 6-First Consent Question

At this point you can click the Save button to confirm your changes.

To see your new portal website for the first time, click the preview button. The system will launch your browser and show you a preview of your website exactly how your client will see it when they log in.

It should go without saying that this is example text only, it has not been checked for compliance and is only there to make it easier for us to explain the set-up process



In our example the preview currently looks like this:

tal - Sprogget a	re https://clientportaltest.360lifecycle.co.uk/sands/Permission/Preview	2 0	M	1
Sprogget a	nd Sylvester			
	360	of	et	
ntrodu		ou		
ntrouu	CLIOIT			
	are no doubt aware Data Privacy Laws in the UK and Europe are being radically overhauled. The have had a flurry of emails in recent weeks asking you to confirm your consent to remain on valists.			8
	owing section outlines our Data Processing activies, basically, how we use your data to help pr vice and other services.	ovide	you	ı
Please	review the items below and in each instance, confirm whether or not you are happy for us to pr	ocee	1.	
Please n		ocee	ł.	
Monthly N		ocee	1.	
Monthly N We would	lewsletter	ocee	d.	
Monthly N We would Typically th Special O	lewsletter like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. nis will include details of ffers	ocee	1.	
Monthly N We would Typically th Special O Exclusive	lewsletter like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. nis will include details of ffers	ocee	1.	
Monthly N We would Typically th Special O Exclusive	lewsletter like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. nis will include details of ffers Deals Market Information	ocee	4.	
Monthly N We would Typically th Special O Exclusive Housing N and much	lewsletter like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. nis will include details of ffers Deals Market Information	oceed	1.	
Monthly N We would I Typically th Special O Exclusive Housing N and much	In the send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. This will include details of ffers Deals Market Information imore for you to use my data for the above purpose. Yes No	oceed	1.	
Monthly N We would I Typically th Special O Exclusive Housing N and much	lewsletter like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. nis will include details of ffers Deals Market Information I more	oceed	4.	
Monthly N We would I Typically th Special O Exclusive Housing N and much I am happy	Inverse the above purpose. Yes No	oceed	1.	

Figure 7- Website Preview

This is a good time to check a few things. It's better to check now than to find out it looks awful after you have invited thousands of clients to confirm their consent.

- Does the introductory paragraph look ok on the web page?
- Does your logo look ok or does it need resizing?
- Have you chosen a suitable theme?

If you spot anything on the page that needs tweaking then simply go back through these instructions and change anything that needs changing.

Should you wish to add further consent questions you can do this now. You can also choose to display an additional message that will be shown to your client if they refuse consent.



You can see how this looks in the configuration screen below.

Real Content - Sprogget and Sylve	ster	_ = X
Settings Questions		
Add Save Delete Preview		
Title		Title
Monthly Newsletter		Additional Product Offers
Additional Product Offers		Explanation
		We would like to send you targeted offers for simple products that don't require advice. For example Quote for Pet Insurance Seasonal quotes for Travel Insurance Over 50s Funeral Plans Show Consequences?
		Marketing Permissions? O Yes No

Figure 8-Additional Question & Consequences

Hitting the save button followed by the preview button will allow you to review your changes at any point. In the preview, this 2nd question now looks like this when you answer no to the consent question.



Figure 9-Consequences

Once you have set up all your consent questions you can move onto the next step.



ADD LINKS TO ADDITIONAL DOCUMENTS

If you wish to add additional documents to the privacy portal you can do this here otherwise move onto the <u>next step</u>.

Examples of document links you may wish to add:

- Privacy Notice
- Data Retention Policy
- Standard Terms of Business
- Company Brochure
- Link to your Website

If you are still in the portal content screen return to page one. Otherwise re-open the screen as shown in <u>Figure 4</u>.

In turn enter a title for each document and a URL pointing to the location then click the add button.

After adding all your links to relevant documents your portal setup screen should look something like this.

Portal Content - Sprogget and Sylvester	-
ettings Questions	
ave Preview	
roduction	
	g radically overhauled. This is why you will have had a flurry of emails in recent weeks asking you to confirm
e following section outlines our Data Processing activies, basically, how we	use your data to help provide you with advice and other services.
Additional Information Links	
Title URL	Add
Title URL	URL
Title URL Title Title Title	URL http://www.sproggetandsylvester.com/privacynotice.htm
itie	URL http://www.sproggetandsylvester.com/privacynotice.htm http://www.sproggetandsylvester.com/dataretentionpolicy.htm
Title IIII IIII IIIII IIIII IIIIIIIIII	URL http://www.sproggetandsylvester.com/privacynotice.htm http://www.sproggetandsylvester.com/dataretentionpolicy.htm http://www.sproggetandsylvester.com/tob.htm
TitleURLIde	URL http://www.sproggetandsylvester.com/privacynotice.htm http://www.sproggetandsylvester.com/dataretentionpolicy.htm

Figure 10-Additional Links



Once you are happy, click save and then you can check all is well by clicking the preview button.

You will see a new section has been added to the bottom of the privacy portal with your links displayed.

For further details, please see the below links			
URL			
http://www.sproggetandsylvester.com			
http://www.sproggetandsylvester.com/brochure.pdf			
http://www.sproggetandsylvester.com/dataretentionpolicy.htm			
http://www.sproggetandsylvester.com/tob.htm			
http://www.sproggetandsylvester.com/privacynotice.htm			
	URL http://www.sproggetandsylvester.com http://www.sproggetandsylvester.com/brochure.pdf http://www.sproggetandsylvester.com/dataretentionpolicy.htm http://www.sproggetandsylvester.com/tob.htm		

Figure 11-Additional Links – Preview

Now is a good time to check that all the links work and point to the correct document. Proceed to the next step once you are happy.



CONFIGURE EMAIL TEMPLATES

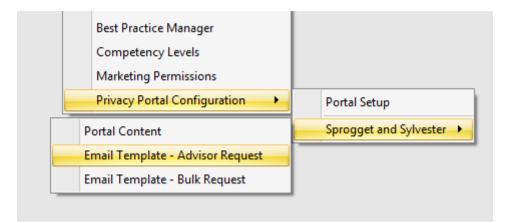


Figure 12-Email Template Menu

These two menu items allow you to configure your templates for sending the portal links to your client. The procedure for both single and bulk requests is identical, however bulk requests have a smaller number of merge fields available.

Single client requests

This template is used when email your clients on a singular basis from the case record. Click the menu item to launch the template editor.

To get you started you can copy and paste the following template. We fully expect that you will change the wording to suit your business and brand as well as adding any further information you deem necessary.

Additional merge fields are available from the right click menu.



@Portal.Logo

Dear @Client.FullName

As you may be aware there are a number of imminent amendments to UK and EU data protection regulation. The GDPR (General Data Protection Review) gives you more control over who has your data and what it is used for.

Therefore, we ask that you visit our privacy portal where we explain our data processes and ask you to state whether you are happy for us to continue doing this.

Our privacy portal can be found at @Portal.ClientUrl

Many Thanks

@System.LoggedOnUserName

Bulk Client Requests

This template is used when you email your clients, masse from the bulk consent request tool.

Repeat the previous procedure for the bulk template. In this example we are able to use exactly the same text in both templates. However, take care to make sure you don't use merge fields that are not available for the bulk template.



Set up path 2 – Simple multi brand setup

How to set up a Privacy Portal

Firstly, log into 360 Lifecycle – Office and go to the maintenance tab. From the compliance menu there is a new item named "Privacy Portal Configuration". Clicking this will show another menu item name "Portal Setup".

You will be presented with the screen shown in Figure 13.

Choose the option "Portal Per Brand" and click "OK".

Portal Setup	x
© Single Brand Portal	Every Brand will be assigned to one Portal
🔘 Portal Per Brand	Each Brand will be assigned to its own Portal
Ø Advanced	Configure each Portal individually
	OK Cancel

Figure 13- Portal Setup - Helper

New/Save Entities External Details SPOC Other	Ho New C	ase Save Refresh Branches D	Maintenance Win	ndows	Mortgages B & C	P Life Insurance	income Protection ~ Pensions ~ investments ~	SPOC Manager	General + General + Clients + Compliance +	
Image: Save All Delete * Git Edges * Jerome Holmes * Perky Pensions Title Git Edges Short Name URL https://clientportaltest.360lfecycle.co.uk/ Portal Logo Portal Theme Additional Information Links Title URL URL Additional Information Links Title URL Add Remove				External				SPOC	10 million (10 mil	*
Image: Save All Delete * Git Edges * Jerome Holmes * Perky Pensions Title Git Edges Short Name URL https://clientportaltest.360lfecycle.co.uk/ Portal Logo Portal Theme Additional Information Links Title URL URL Additional Information Links Title URL Add Remove		Client Merge Tool × Portal Se	tup 🗙						4	×
Ready	Case Search	* Gilt Edges * Jerome Holmes	Short Name URL Portal Logo Portal Theme Additional Inforr Title	https://clientportaltest.360li	ifecycle.co.uk/		Upload	✓ Gilt Edges	Remove	

You will be presented with the following portal set up screen:

Figure 14- Portal Setup

Enter the title of your portal. Typically, this will be your company name.

Now choose a Short Name, this is a small piece of text that is included in the URL of the portal. This allows the system to display the correct branding for your business. As it



also forms part of the URL, your clients can have more confidence that they are going to the correct place. Next, choose a portal logo. This will normally be the same one you use to display on Reports. Should you need to upload a different Logo you can do so here.

Your portal comes preconfigured with a number default themes or styles. Choose a theme that most closely matches your brand image and one where your logo does not clash with the colour scheme. There is a preview button here so you can have some idea what each theme and colour scheme look like. Don't worry you can always come and change this later if you need to.

Maintenance Accounts 1 SAL CO General S FOR Income Protection 8 😓 SPOC Manager Pensions -💫 Clients -Branches Diary Staff Members Brands Introducers Negotiators Mortgages B & C Life Insurance Ser Access Groups S Compliance Investments -Client Merge Tool X Portal Setup X × H X 0 Add Save All Delete * Gilt Edges * Jerome Holmes Title Gilt Edges * Perky Pensions Short Name GEdges Brands Gilt Ed URL https://dientportaltest.360lifecyde.co.uk/GEdges Portal Logo Flower.jpg - Upload Portal Theme Flatly - Show Theme Additional Information Links Title URL Add Remov Title URL

Your screen should now look something like this:

Figure 15-Portal Setup Complete

Hit the Save button and you are done. You can now close this screen.



CONFIGURE YOUR CONSENT QUESTIONS

A new series of menu items will have now been added to the menu to allow you to further customise the portal you just configured. Click the "Portal Content" menu item.

Competency Levels Marketing Permissions		
Privacy Portal Configuration	Portal Setup	
	Gilt Edges	Portal Content
	Jerome Holmes 🕨	Email Template - Advisor Reques
	Perky Pensions 🔸	Email Template - Bulk Request

Figure 16- New Portal Menu

You will be presented with the following screen.

Go ahead and enter an introduction. Again, don't worry if you don't get this right first time, you can always come back and change it later.

Setting	Questions
Save	Q Preview
Introdu	
	e no doubt aware Data Privacy Laws in the UK and Europe are being radically overhauled. This is why you will have had a flurry of emails in recent weeks asking you to pur consent to remain on various mailing lists.
The fol	ing section outlines our Data Processing activies, basically, how we use your data to help provide you with advice and other services.
Additio	el Information Links
Title	
URL	
	Add Remove

Figure 17- Enter Website Introduction

Now go to the second page titled "Questions" and click the Add button on the toolbar.

Go ahead and type in the details of the consent question you wish to ask of your clients and click save. At this point your screen should look something like this...



EALON Questions		
Add Save Delete Preview		
Tide	4	Title
* Monthly Newsletter		Monthly Newsletter
		Explanation
		We would like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. Typically this will include details of Special Offers Exclusive Deals Housing Market Information and much more
		Show Consequences?
		⊖Yes
		Marketing Permissions
		Link to Marketing Permissions? () Yes () No

Figure 18-First Consent Question

At this point you can click the Save button to confirm your changes.

To see your new portal website for the first time, click the preview button. The system will launch your browser and show you a preview of your website exactly how your client will see it when they log in.

It should go without saying that this is example text only, it has not been checked for compliance and is only there to make it easier for us to explain the set-up process.



In our example the preview currently looks like this:

Perky Pensions	
ntroduction	
	e data privacy laws in the UK and Europe are being radically overhauled. This is why you will have had a flurry of sing you to confirm your consent to remain on various mailing lists.
The following section outl services.	ines our Data Processing activities, basically, how we use your data to help provide you with advise and other
Please review the items be	elow and in each instance, confirm whether or not you are happy for us to proceed.
Monthly Newsletter	
We would like to send you a regul	ar monthly newsletter. We pride ourselves on making this both informative and relevant.
Typically this will include the deta	ils of:
Special Offers	
Exclusive Deals	
Housing Market Information	
and much more	
I am happy for you to use my data	for the above purpose. Yes No O
Update my preferences	
	Client Portal v1.0.18138.1 © 360 Dot Net - 2018
	360 Dotnet

Figure 19- Website Preview

This is a good time to check a few things. It's better to check now than to find out it looks awful after you have invited thousands of clients to confirm their consent.

- Does the introductory paragraph look ok on the web page?
- Does your logo look ok or does it need resizing?
- Have you chosen a suitable theme?

If you spot anything on the page that needs tweaking then simply go back through these instructions and change anything that needs changing.

Should you wish to add further consent questions you can do this now. You can also choose to display an additional message that will be shown to your client if they refuse consent.

You can see how this looks in the configuration screen...



Home Tools Accounts Maintenance	Windows
New Case Save Refresh New/Save Refresh New/Save Refresh New/Save Enbbes	Introducers Negotiators Mortgages B & C Life Insurance Income Protection ~ SPOC Manager General ~ External Mortgages B & C Life Insurance Investments ~ SPOC Manager Clients ~ External Details SPOC SPOC Manager Other Other
Portal Content - Perky Pensions 💌	x < >
Settings Questions	
Add Save Delete Preview	
Title Generation Control Contr	Title Additional Product Offers
Additional Product Offers	Explanation
	We would like to send you targeted offers for simple products that don't require advice.
	For example:
	Ouote for Pet Insurance
	Seasonal quotes for Travel Insurance Over 50s Funeral Plans
	Show Consequences?
	● Yes O No
	We really try our best to make sure that you only receive offers and quotes taht are relevant to you and your family. You could be missing out!
	Marketing Permissions
	Link to Marketing Permissions? O Yes No
Ready	

Figure 20-Additional Question & Consequences

Hitting the save button followed by the preview button will allow you to review your changes at any point. In the preview, this 2nd question now looks like this when you answer no to the consent question.

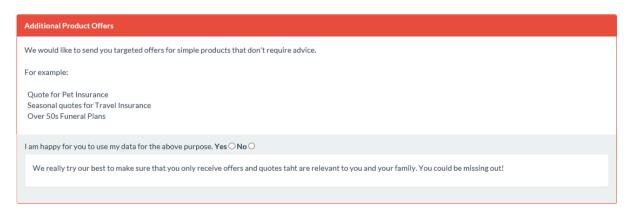


Figure 21-Consequences

Once you have set up all your consent questions you can move onto the next step.



ADD LINKS TO ADDITIONAL DOCUMENTS

If you wish to add additional documents to the privacy portal, you can do this here, otherwise move onto the next step.

Examples of document links you may wish to add:

- Privacy Notice
- Data Retention Policy
- Standard Terms of Business
- Company Brochure
- Link to your Website

In turn enter a title for each document and a URL pointing to the location then click the add button.

After adding all your links to relevant documents your portal setup screen should look something like this:

Settings Quettons	
Save Preview	
ntroduction	
your consent to remain on various mailing lists.	urope are being radically overhauled. This is why you will have had a flurry of emails in recent weeks asking you to confirm
The following section outlines our Data Processing activies, bas	scally, how we use your data to help provide you with advice and other services.
Additional Information Links	
Additional Information Links Title	
1993 Sector Sector Sector	
Title	Ant Remove
Title	LRL Remove
Title URL Title	
Title URL Title	URL
Title URL Title Title Full Privacy Notice	URL http://www.aproggetandsylvester.com/privacynotice.htm
Title URL Title Full Privacy Nedece Data Retention Policy	URL http://www.aproggetandsylvester.com/privacynotice.htm http://www.sproggetandsylvester.com/dataretentionpolicy.htm

Figure 22-Additional Links

Once you are happy, click save and then you can check all is well by clicking the preview button.

You will see a new section has been added to the bottom of the privacy portal with your links displayed.



Additional Information	
For further details, please see the below li	nks
Title	URL
Our Website	http://www.sproggetandsylvester.com
About Our Services	http://www.sproggetandsylvester.com/brochure.pdf
Data Retention Policy	http://www.sproggetandsylvester.com/dataretentionpolicy.htm
Standard Terms of Business	http://www.sproggetandsylvester.com/tob.htm
Full Privacy Notice	http://www.sproggetandsylvester.com/privacynotice.htm

Figure 23-Additional Links – Preview

Now is a good time to check that all the links work and point to the correct document. Proceed to the next step once you are happy.

CONFIGURE EMAIL TEMPLATES

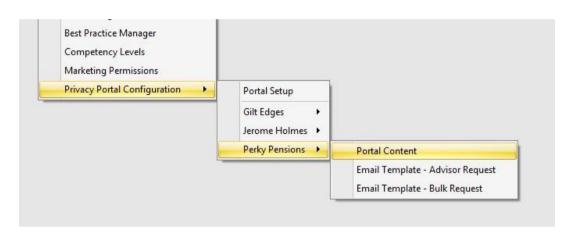


Figure 24-Email Template Menu

These two menu items allow you to configure your templates for sending the portal links to your client. The procedure for both single and bulk requests is identical, however bulk requests have a smaller number of merge fields available.

Single client requests

This template is used when email your clients on a singular basis from the case record. Click the menu item to launch the template editor.

To get you started you can copy and paste the following template. We fully expect that you will change the wording to suit your business and brand as well as adding any further information you deem necessary.

Additional merge fields are available from the right click menu.



@Portal.Logo

Dear @Client.FullName

As you may be aware there are a number of imminent amendments to UK and EU data protection regulation. The GDPR (General Data Protection Review) gives you more control over who has your data and what it is used for.

Therefore, we ask that you visit our privacy portal where we explain our data processes and ask you to state whether you are happy for us to continue doing this.

Our privacy portal can be found at @Portal.ClientUrl

Many Thanks

@System.LoggedOnUserName

Bulk Client Requests

This template is used when email your clients en masse from the bulk consent request tool. Repeat the previous procedure for the bulk template. In this example we are able to use exactly the same text in both templates. However, take care to make sure you don't use merge fields that are not available for the bulk template.



Setup Path 3 – Advanced setup procedure

How to set up a privacy portal

Firstly, log into 360 Lifecycle – Office and go to the maintenance tab. From the compliance menu there is a new item named "Privacy Portal Configuration". Clicking this will show another menu item name "Portal Setup".

You will be presented with the screen shown in Figure 25.

Choose the option "Advanced" and click "OK".

You will be presented with the following portal set up screen:

Portal Setup	x
© Single Brand Portal	Every Brand will be assigned to one Portal
© Portal Per Brand	Each Brand will be assigned to its own Portal
© Advanced	Configure each Portal individually
	OK Cancel

Figure 25- Portal Setup Help

Home	Tools	Accounts	Maintenance	Win	dows							-	
New Case		D resh ase	Diary Staff Views Members Entities	Brands	Introducers 1		Mortgages	B&C	Life Insurance	Income Protection + Pensions + Investments +	SPOC Manager	 General • Clients • Compliance • Other 	8
Cas	Portal Setup	X All Delete										4	* x
search .	* New Portal		Port	Name URL URL I	New Portal	rtaltest. 360lifi	fecycle, co.uk	4		Upload Show Theme	Brands Git Edges Jerome Holmes Perky Pensions Add	Remove	

Figure 26 – Portal Set up

Enter the details required for the portal:

Enter the title of your portal. Typically, this will be your company name. Now choose a Short Name, this is a small piece of text that is included in the URL of the portal. This allows the system to display the correct branding for your business. As it also forms part of the URL, your clients can have more confidence that they are going to the correct place. Next, choose a portal logo. This will normally be the same one you use to display on Reports. Should you need to upload a different logo you can do so here



Your portal comes preconfigured with a number default themes or styles. Choose a theme that most closely matches your brand image and one where your logo does not clash with the colour scheme. There is a preview button here so you can have some idea what each theme and colour scheme look like. Don't worry you can always come and change this later if you need to.

Select one or more brands that will use this portal. Your screen should now look something like this:

Home	Tools A	Accounts	Mainte	enance V	lindows						
Nev	Save Refresh Case	Branches	Diary Views M		and the second difference of the second s	Mortgages	₩ B & C	Life Insurance Details	Income Protection + Pensions + Investments +	SPOC Manager	 Ø General + Olients + Compliance + Other
Ad Ad	Id Save All Do Gilt Pensions	K elete		Title Short Name URL Portal Logo Portal Theme Additional Info Title	Gpens https://dientportaltest.360 cogs.jpg Darkly	lifecycle.co.uk	/Gpens		Upload Show Theme	Brands Gilt Edges Jerome Holmes Perky Pensions	
Ready				Title				URL		Add	Remove

Figure 27-Portal Setup Complete

Hit the Save button and you are done. You can now add other portals (if you have any unassigned brands) or close this screen.



CONFIGURE YOUR CONSENT QUESTIONS

A new series of menu items will have now been added to the menu to allow you to further customise the portal you just configured. Click the "Portal Content" menu item.

Competency Levels Marketing Permissions		
Privacy Portal Configuration	Portal Satup	
	Git Persions	Portal Content
		Email Template - Advisor Request
		Email Template - Bulk Request

Figure 28- New Portal Menu

You will be presented with the following screen. Go ahead and enter an introduction. Again, don't worry if you don't get this right first time, you can always come back and change it later.

Settings	Questions	
Save	Q Preview	
Introduc	tion	
confirm	are no doubt aware Data Privacy Laws in the UK and Europe are being radically overhauled. This is why you will have had a flurry of emails in re your consent to remain on various mailing lists.	ecent weeks asking you to
The fold	owing section outlines our Data Processing activies, basically, how we use your data to help provide you with advice and other services.	
Additio	nal Information Links	
Title		
URL		
		Add Remove

Figure 29- Enter Website Introduction

Now go to the second page titled "Questions" and click the Add button on the toolbar.

Go ahead and type in the details of the consent question you wish to ask of your clients and click save. At this point your screen should look something like this...



tie Monthly Newsletter	Title Monthly Newsletter			
	Explanation We would like to send you a regular monthly newsletter. We pride ourselves on making this both informative and relevant. Typically this will include details of Special Offers Exclusive Deals Housing Market Information and much more			
	Show Consequences? Yes No Marketing Permissions Link to Marketing Permissions? Yes No			

Figure 30-First Consent Question

At this point you can click the Save button to confirm your changes.

To see your new portal website for the first time, click the preview button. The system will launch your browser and show you a preview of your website exactly how your client will see it when they log in.

It should go without saying that this is example text only, it has not been checked for compliance and is only there to make it easier for us to explain the set-up process.



In our example the preview currently looks like this:

Gilt Pensions	
ntroduction	
SM5 Messages	
Are you happy to receive text messages from us?	
I am happy for you to use my data for the above purpose. Yes $\odotNo\bigcirc$	
Update my preferences	
Client Portal v1.0.18138.1 © 360 Dot Net	t-2018
360 Dotnet	

Figure 31- Website Preview

This is a good time to check a few things. It's better to check now than to find out it looks awful after you have invited thousands of clients to confirm their consent.

- Does the introductory paragraph look ok on the web page?
- Does your logo look ok or does it need resizing?
- Have you chosen a suitable theme?

If you spot anything on the page that needs tweaking then simply go back through these instructions and change anything that needs changing.

Should you wish to add further consent questions you can do this now. You can also choose to display an additional message that will be shown to your client if they refuse consent.



You can see how this looks in the configuration screen below:

Hon	ne Tool	s /	Accounts	Maint	enance	Wind	dows			_				
New Ca	se Save P	() lefresh Case	Branches	Views	Staff Members	Brands	Introducers Negotiators	Mortgages	B&C	Hife Insurance	Income Protection * Pensions * Investments *	SPOC Manager	 General • Clients • Compliance • 	
0.	New/Save		-	Entit	ies		External			Details		SPOC	Other	
🥳 Case Search	•	Question we De	lete Prev			Add Exp We For Q Se O Si Ww mis	e ditional Product Offers lanation e would like to send you targ r example: juote for Pet Insurance easonal quotes for Travel I wer 50s Funeral Plans thow Consequences?	e sure that yo		eceive offers an		rant to you and your family		×
Ready											_			

Figure 32-Additional Question & Consequences

Hitting the save button followed by the preview button will allow you to review your changes at any point. In the preview, this 2nd question now looks like this when you answer no to the consent question.

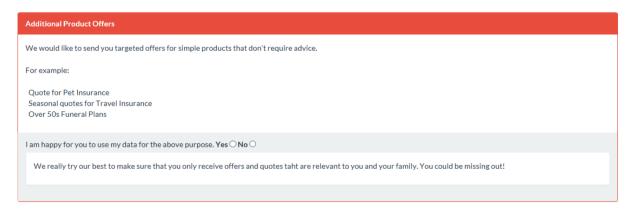


Figure 33-Consequences

Once you have set up all your consent questions you can move onto the next step.



ADD LINKS TO ADDITIONAL DOCUMENTS

If you wish to add additional documents to the privacy portal, you can do this here otherwise move onto the next step.

Examples of document links you may wish to add:

- Privacy Notice
- Data Retention Policy
- Standard Terms of Business
- Company Brochure
- Link to your Website

In turn enter a title for each document and a URL pointing to the location then click the add button. After adding all your links to relevant documents your portal setup screen should look something like this:

tereduction s you are no doubt aware Data Privacy Laws in the UK and Europe are being radically overhauled. This is why you will have had a flurry of emails in recent weeks asking you to confirm or content to remain on various maling lats. the following section outlines our Data Processing activies, basically, how we use your data to help provide you with advice and other services. ease review the items below and in each instance, confirm whether or not you are happy for us to proceed. Addsonal Information Links Title Addsonal I	ettings Quettions	
treduction s you are no doubt aware Data Privacy Laws in the UK and Europe are being radically overhauled. This is why you will have had a flurry of emails in recent weeks asking you to confirm our content to remain on various maling lats. he following section outlines our Data Processing actives, basically, how we use your data to help provide you with advice and other services. lease review the items below and in each instance, confirm whether or not you are happy for us to proceed. Additional Information Links Title URL Additional Information Links Title Additional In	_	
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lease review the items below and in each instance, confirm whether or not you are happy for us to proceed. Additional Information Links Title URL Information Links Title URL Information Links		urope are being reactary overnauled. This is why you will have had a numy of emails in recent weeks asking you to commit
Title URL Inte Inte Inte Inte Inte Inte Inte Inte	he following section outlines our Data Processing activies, bas	scally, how we use your data to help provide you with advice and other services.
Life Life File File https://www.sproggetandsylvester.com/privacynotice.htm Data Retention Policy https://www.sproggetandsylvester.com/dataretentionpolicy.htm Standard Terms of Business https://www.sproggetandsylvester.com/brokule.htm About Our Services http://www.sproggetandsylvester.com/brokule.pdf	lease review the items below and in each instance, confirm wi	hether or not you are happy for us to proceed.
Title URL Inte Inte Inte Inte Inte Inte Inte Inte		
Title URL Ann Remove Infe URL Id Privacy Notice Number Second Sec		
Initie		
Inite URL Ide URL URL Ide Privacy Notice Nation Notice Nation Nat		
Title URL Ann Remove Infe URL Id Privacy Notice Number Second Sec		
Title URL Ann Remove Infe URL Id Privacy Notice Number Second Sec		
Title URL Ann Remove Infe URL Id Privacy Notice Number Second Sec		
Title URL Ann Remove Infe URL Id Privacy Notice Number Second Sec		
Title URL Inte Inte URL Inte Inte Inte Inte Inte Inte Inte Inte		
URL LEL LEL LEL LEL LEL LEL LEL LEL LEL L	Additional Information Links	
Ann Remove Tide URL Tid Privacy Notice http://www.sproggetandsylvester.com/privacynotice.htm Data Retention Policy http://www.sproggetandsylvester.com/dataretentionpolicy.htm Standard Terms of Business http://www.sproggetandsylvester.com/bb.htm Notor Our Services http://www.sproggetandsylvester.com/bb.htm	Title	
Ann Remove Tide URL Full Privacy Notice http://www.sproggetandsylvester.com/privacynotice.htm Data Retention Policy http://www.sproggetandsylvester.com/dataretentionpolicy.htm Standard Terms of Business http://www.sproggetandsylvester.com/bb.htm Absolut Our Services http://www.sproggetandsylvester.com/bb.htm		
Life Life Full Privacy Notice http://www.sproggetandsylvester.com/privacynotice.htm Data Retention Policy http://www.sproggetandsylvester.com/dataretentionpolicy.htm Standard Terms of Business http://www.sproggetandsylvester.com/brokule.htm About Our Services http://www.sproggetandsylvester.com/brokule.pdf		
Exit Privacy Notice http://www.sproggetands/tvester.com/privacynotice.htm Data Retention Policy http://www.sproggetands/tvester.com/dataretentionpolicy.htm Standard Terms of Business http://www.sproggetands/tvester.com/dob.htm About Our Services http://www.sproggetands/tvester.com/brochure.pdf		Add Remove
Data Retention Policy http://www.sproggetandsylvester.com/dataretentionpolicy.htm Standard Terms of Business http://www.sproggetandsylvester.com/tob.htm About Our Services http://www.sproggetandsylvester.com/tob.htm		
Standard Terms of Business http://www.sproggetandsylvester.com/tob.htm Noout Our Services http://www.sproggetandsylvester.com/brochure.pdf		
about Our Services http://www.sproggetandsylvester.com/brochure.pdf		
	Standard Terms of Business	http://www.sproggetandsylvester.com/tob.htm
Dur Website http://www.sproggetandsylvester.com	About Our Services	http://www.sproggetandsylvester.com/brochure.pdf
	Our Website	http://www.sproggetandsylvester.com

Figure 34-Additional Links

Once you are happy, click save and then you can check all is well by clicking the preview button. You will see a new section has been added to the bottom of the privacy portal with your links displayed.



Additional Information								
For further details, please see the below links								
Title	URL							
Our Website	http://www.sproggetandsylvester.com							
About Our Services	http://www.sproggetandsylvester.com/brochure.pdf							
Data Retention Policy	http://www.sproggetandsylvester.com/dataretentionpolicy.htm							
Standard Terms of Business	http://www.sproggetandsylvester.com/tob.htm							
Full Privacy Notice	http://www.sproggetandsylvester.com/privacynotice.htm							

Figure 35-Additional Links – Preview

Now is a good time to check that all the links work and point to the correct document. Proceed to the next step once you are happy.

CONFIGURE EMAIL TEMPLATES

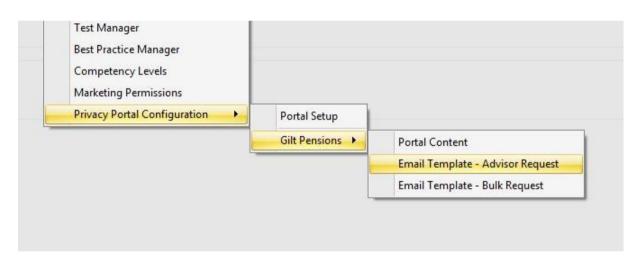


Figure 36-Email Template Menu

These two menu items allow you to configure your templates for sending the portal links to your client. The procedure for both single and bulk requests is identical, however bulk requests have a smaller number of merge fields available.

Single client requests

This template is used when email your clients on a singular basis from the case record. Click the menu item to launch the template editor.

To get you started you can copy and paste the following template. We fully expect that you will change the wording to suit your business and brand as well as adding any further information you deem necessary.



Additional merge fields are available from the right click menu.

@Portal.Logo
Dear @Client.FullName
As you may be aware there are a number of imminent amendments to UK and EU data protection regulation. The GDPR (General Data Protection Review) gives you more control over who has your data and what it is used for.
Therefore, we ask that you visit our privacy portal where we explain our data processes and ask you to state whether you are happy for us to continue doing this.
Our privacy portal can be found at @Portal.ClientUrl
Many Thanks
@System.LoggedOnUserName

Bulk Client Requests

This template is used when email your clients en masse from the bulk consent request tool. Repeat the previous procedure for the bulk template. In this example we are able to use exactly the same text in both templates. However, take care to make sure you don't use merge fields that are not available for the bulk template.



CLIENT MERGE TOOL

Deduplicating clients

In 360 Office – Tools, there is a "Client Merge Tool". This feature can be used to ensure that "Privacy" portals are not sent to the same client more than once if they are on multiple case records.

By clicking on this, you should see a similar screen to the one demonstrated below:

efresh Case	Bulk Notes Case Merge	Client Merge T Bulk Consent F	Marketing	Performance Compliance Explorer Manager Managemen	Performance Report	Document Library Documents	 User Settings Change Password Reset Preferences Settings
Client Merge Tool	Adhin Tools			Nandyene	it roois	edementen (Setungs
Filters Company Servicing Advisor Surname Starts With	All Companies All Advisors		atching Fields Forename, Surna Forename, Surna Email Only		Glean		
Forename	Surname	DOB	Email	Matches	Process		

Figure 37-Client Merge

Here, potential 'Matching Fields' can be selected such as cases with clients who have the same 'Forename, Surname, DOB and Email Address', along with some filtering options which can be used to narrow-down clients for a particular "Company", "Servicing advisor" and "Surname." Once these options have been applied, click the "search" button, and this will feature a list of clients with matching case records, similar to Figure 38.



Hom	e Tools Acco	unts Maintenance W	/indows										
	e 🖆 🖷	nin Bulk Notes Case Merge	Case Delete Tool Client Merge Tool Bulk Consent Requests	Marketing Tools *	Performance Explorer Manager Manageren	Import Leads Compliance Search Performance Report t Tools	Document Library Documents	Pay	User Settings Change Password Reset Preferences Settings				
	Client Merge Tool	ient Merge Tool 🕱											
Case Search	Filters Company ServicingAdvisor Surname Starts With	All Advisors	O For O Emi	ename, Surn	ame, DOB and Email ame and DOB								
					Search	Clear							
	Forename	Surname	DOB Em	ail	Matches	Process							
	Mark	Thyme	01/01/1971 m.t	hyme.360@g	mail.com 2	Process							

Figure 38- Matching clients

Now, if you click the "Process" button, this will bring up the Deduplication Wizard:

Client Deduplication	
Client Deduplication Tool	Step 1 of 3
We have found a number of potential duplicate records.	
Two client records have the same Forename, Surname, DOB and Email Address. No client records have the same Forename, Surname and DOB.	
One further record has the same email address but does not appear to be the same person.	
Cancel Skip	Back

Figure 39- Deduplication Wizard



Press "Next" and now is the option to select which records you would like to "Merge" and which record you want to "Keep" the details of.

Client Deduplication Client Deduplication Tool Step 2 of 3									
Case Id Forename Surname DOB Email Home Work Mobile Merge Keep									
1003604	Marcus	Thyme	01/01/1981	m.thyme					
1003602	Mark	Thyme	01/01/1971				0767676		0
1003601	Mark	Thyme	01/01/1971	m.thyme			0767676		0
Cancel Skip Back Next									

Figure 40- Keep / Merge details

Once the details have been selected, the 'Dedupe' option will now be available.

Client Deduplication	
Client Deduplication Tool	Step 3 of 3
Three clients will be merged together.	
The data for the client attached to Case ID 1003601 will remain and this client will be attach	ed to the following cases:
1003604 - Marcus Thyme - 01/01/1981 1003602 - Mark Thyme - 01/01/1971	
Cancel Skip	Back Dedupe

Figure 41- Dedupe Confirmation



When opening a case record, you can easily confirm whether this client is duplicated elsewhere across the system; this can be identified by the warning sign next to the email address at the bottom of the Client Details tab. On this tab, you can also deduplicate on a case by case basis selecting "Remove Duplicates" as shown below:

Client Details	Case Detail	Contact History	Documents	Reviews	ATR Question	naires	Conveyancing	
Client Details			Contact Deta	nils				
Client Type	Retail Client	· ·	Home		0	Work	٩	
Title	Miss 👻		Mobile	\$		Email	support@360lifecycle.co.uk	
Forename	Chloe		🔲 Client has no Email Address					
Middle Names			Additional Inf	formation				
Surname	Smith		Occupation)ccupation		NI	Number	
D.0.B.		1	Status		Ŧ		Income £0.00 ‡	
Sex		•	Smoker	Unknown	•	Depe	endants 0 🗘	
Potential dupl	icate records	found for Chloe	Work Ph	ione	Mobile Phor	ne le	Add Client Remove Client	
Miss Chloe Sr		0				-	support@360lifecyde	
Data Privacy Se	ottinge							

Figure 42- Case Record Deduplication



MARKETING

Under the Compliance tab in Maintenance, 'Marketing Permissions' can be set, which will add the defined permission into Campaign Manager. If you choose to select "Auto-add as filter in Campaign Manager", the permission will automatically be added to the Query Builder section in Campaign Manager each time you open the module.



Figure 43- Marketing Permissions

When defining 'Questions' in the content section during the portal setup, responses can be traced in Campaign Manager if the 'link to Marketing Permissions?' section has been selected as 'Yes' as show below. Marketing Permissions will be applied provided the client answers 'Yes' to the relevant question:

Marketing Permissions × Portal Content - Gilt Per	sions 🗵	\leftarrow \rightarrow \times
Settings Questions		
Add Save Delete Preview		
Title * SMS Messages	Title SMS Messages Explanation Are you happy to receive text messages from us?	
	Show Consequences?	
	Marketing Permissions Link to Marketing Permissions? Yes No	

Figure 44- Marketing Permissions