

Send personal data on request

According to GDPR it is required that your organisation can provide all stored personal data on demand. As a data owner you are required to present all personal data per request according to GDPR. webCRM enables you to address such request in a number of ways.

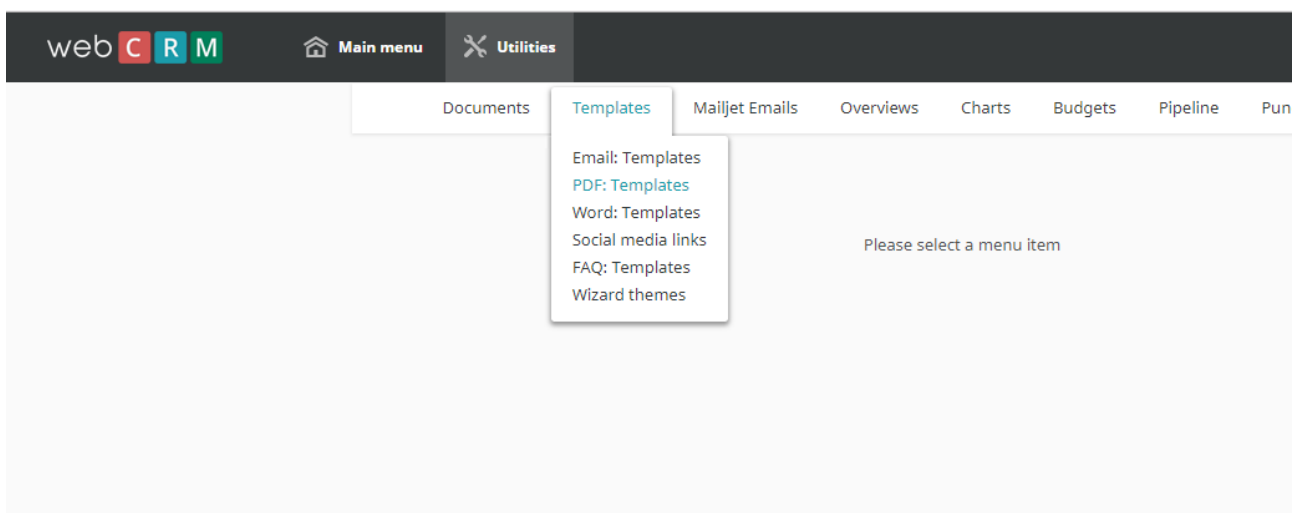
If you receive a request for sending or showing all stored personal data from an individual there are 3 ways to do so:

1. Provide and send the data using PDF-templates
2. Print out from the person view
3. Exporting to Excel

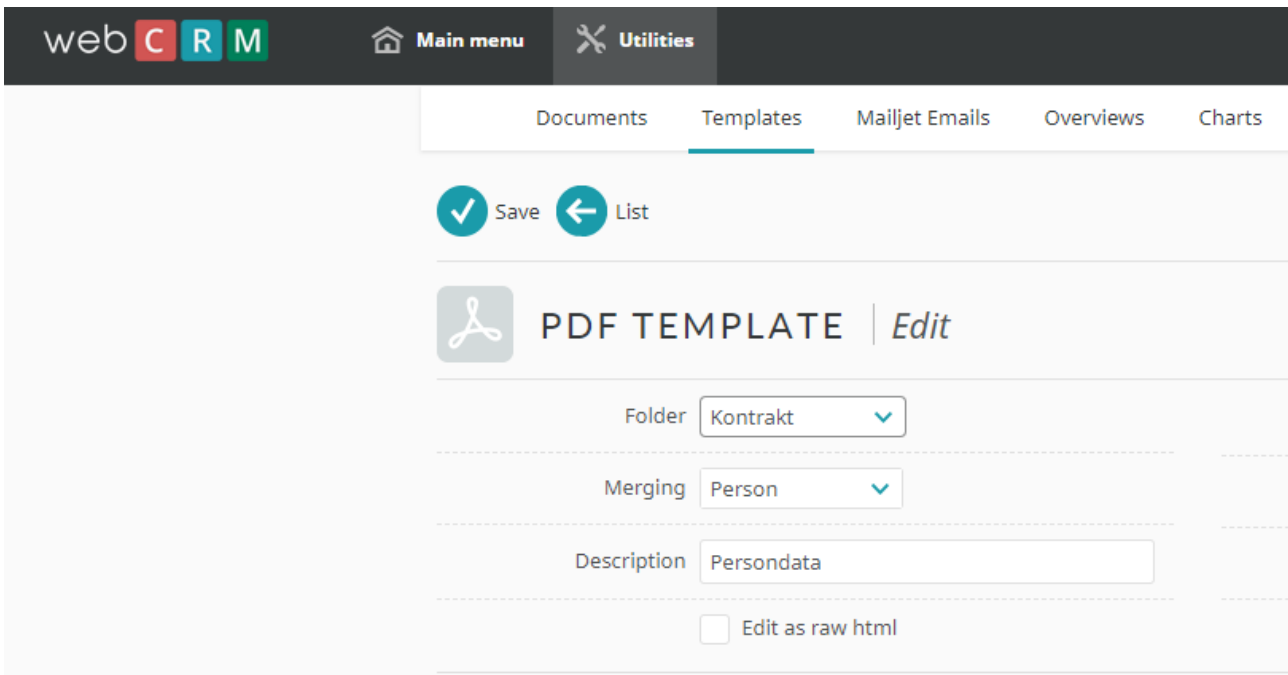
Provide and send the data using PDF-templates

Personal data can be sent using PDF to the requesting person directly from webCRM. PDF templates provides the ability to customise the design if you want to brand the sent-out PDF. All created PDF templates that merge with persons in webCRM will be available from all person views and from here able sent directly to the requesting person. Doing so will date stamp the email sent-out enabling webCRM users to document accommodated requests.

To be able to use PDF templates for sending out stored personal data, firstly it will need to be created using merge for person data in webCRM. PDF templates are created from utilities/templates/PDF templates:

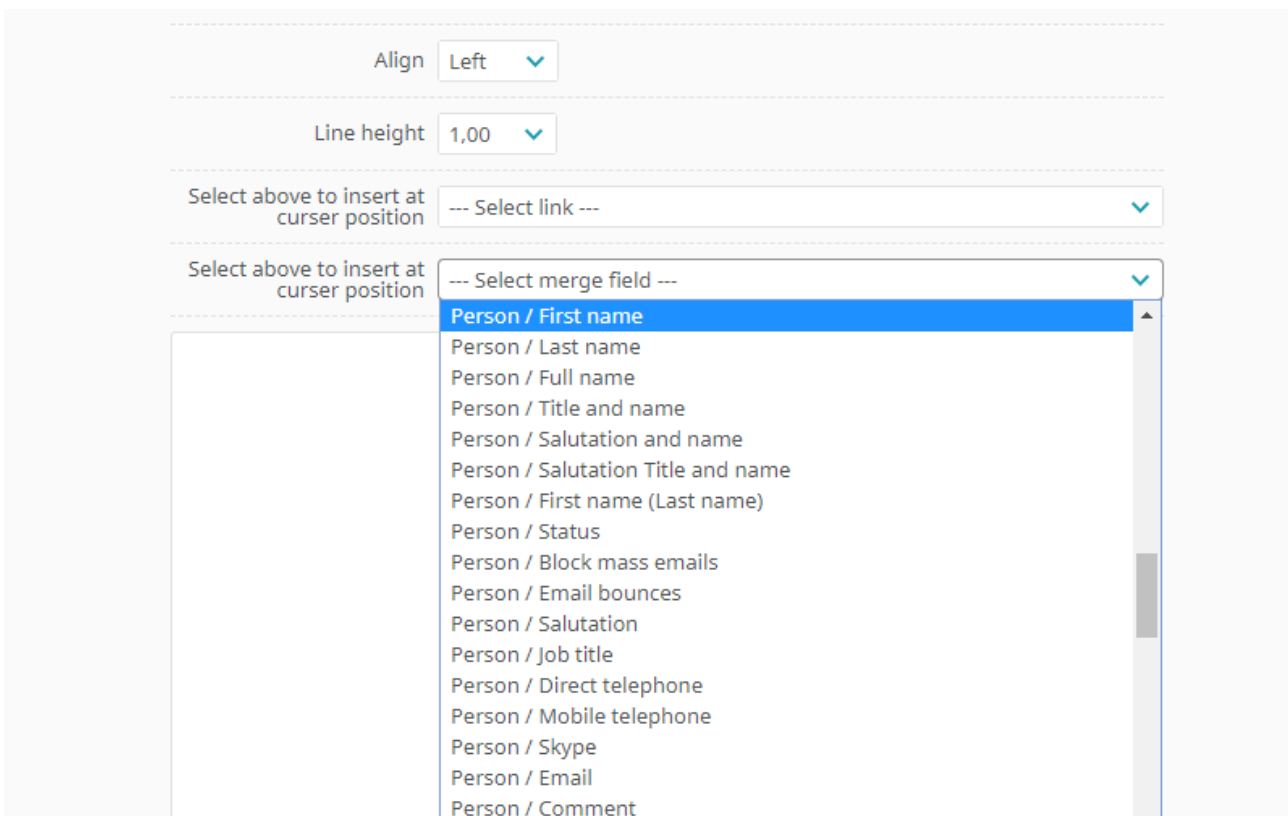


Create a new template and select merging for "Person":



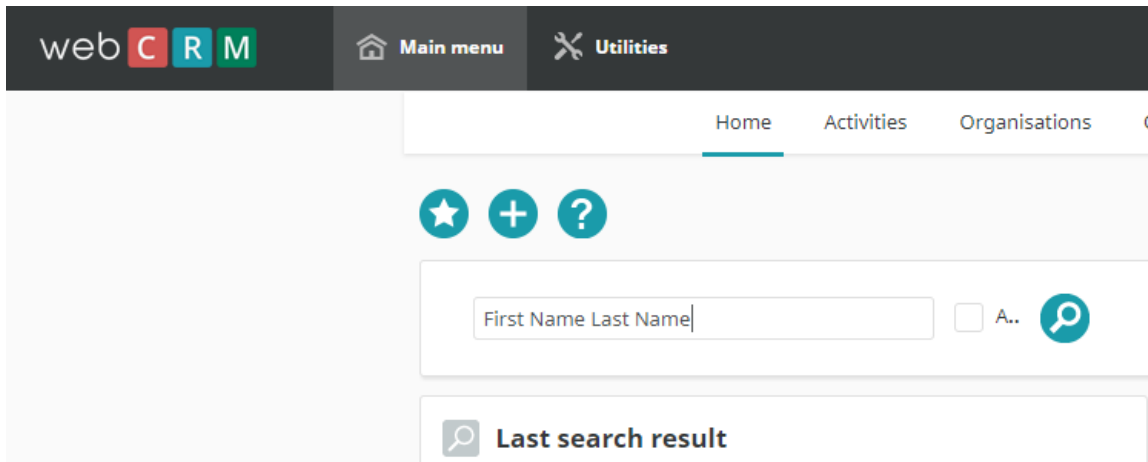
The screenshot shows the webCRM interface for editing a PDF template. The top navigation bar includes 'Main menu' and 'Utilities'. Below it, a secondary navigation bar has 'Documents', 'Templates' (highlighted), 'Mailjet Emails', 'Overviews', and 'Charts'. The main content area features a 'Save' button with a checkmark and a 'List' button with a left arrow. Below these is a 'PDF TEMPLATE | Edit' section with a document icon. The configuration options are: 'Folder' set to 'Kontrakt', 'Merging' set to 'Person', and 'Description' set to 'Persondata'. There is also an unchecked checkbox for 'Edit as raw html'.

Having done so select all fields containing person data – which is required by GDPR – and merge these into a text box in the PDF template:

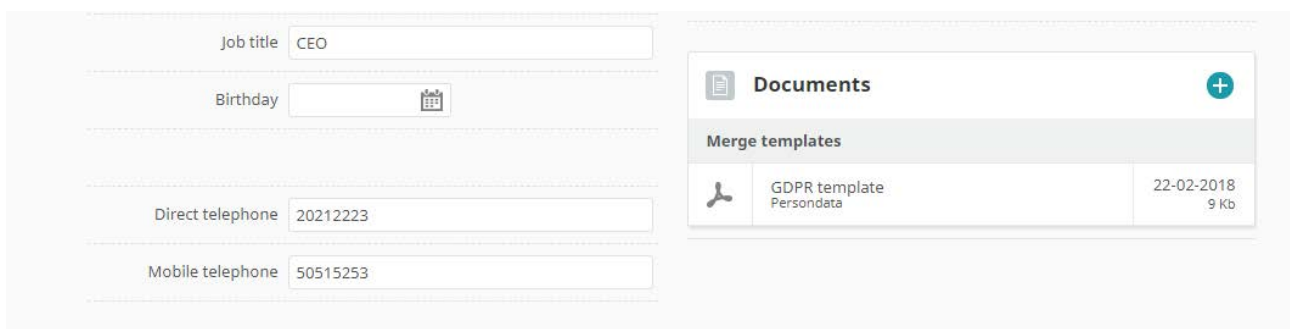


This screenshot shows a detailed view of the PDF template editor. It includes settings for 'Align' (Left) and 'Line height' (1,00). Below these are two dropdown menus for inserting content at the cursor position: '--- Select link ---' and '--- Select merge field ---'. The 'Select merge field' dropdown is open, displaying a list of available fields. The first item, 'Person / First name', is highlighted in blue. Other items in the list include 'Person / Last name', 'Person / Full name', 'Person / Title and name', 'Person / Salutation and name', 'Person / Salutation Title and name', 'Person / First name (Last name)', 'Person / Status', 'Person / Block mass emails', 'Person / Email bounces', 'Person / Salutation', 'Person / Job title', 'Person / Direct telephone', 'Person / Mobile telephone', 'Person / Skype', 'Person / Email', and 'Person / Comment'.

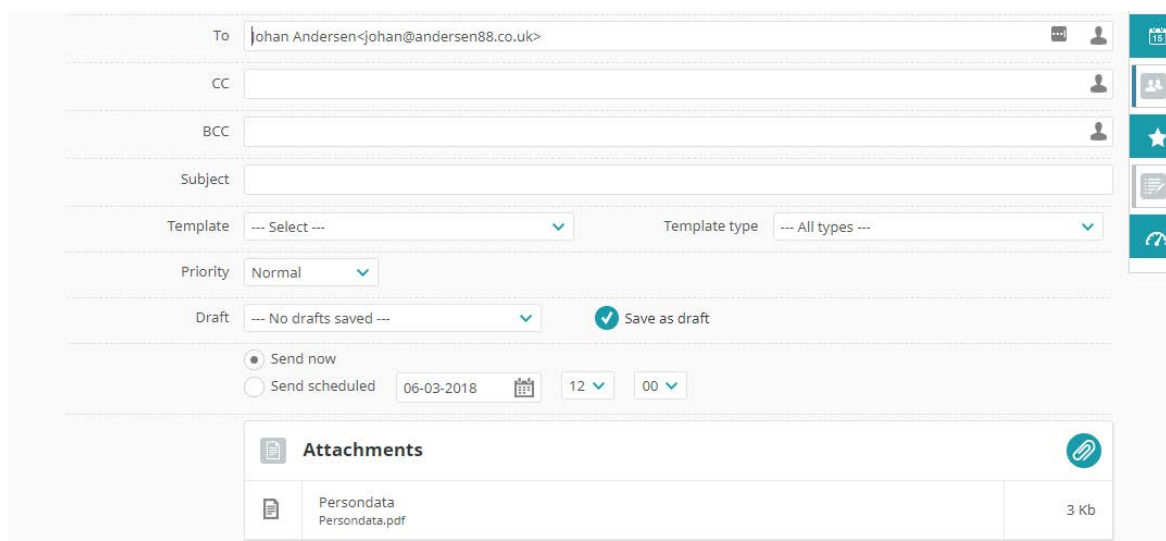
To search for the specific person that requested his/her data sent use the front-page search box in webCRM:



Having created a PDF template that merges with person data it will be available from all person views going forward. The PDF template will use the inserted merge fields to add individual person data based on the specific person from whom the PDF is generated from:



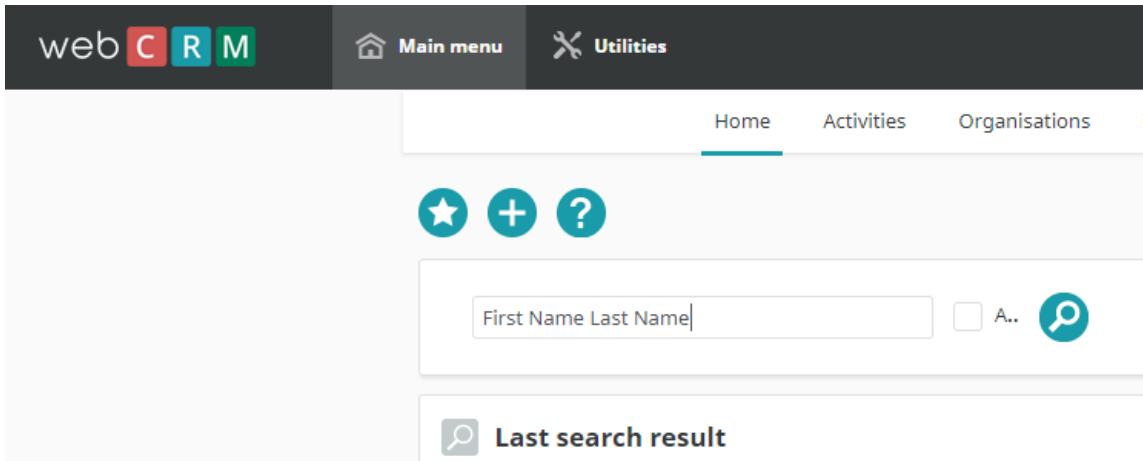
After saving the PDF template for the specific person it is possible to attach the PDF to an email by clicking the attach icon (paper clip) in the upper right corner:



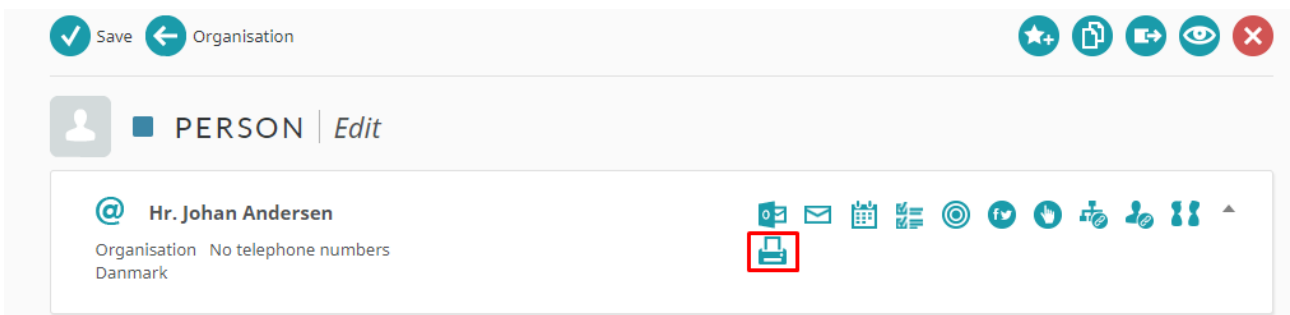
Print out from person view

It is possible to print out person data by clicking the print icon directly from the person view.

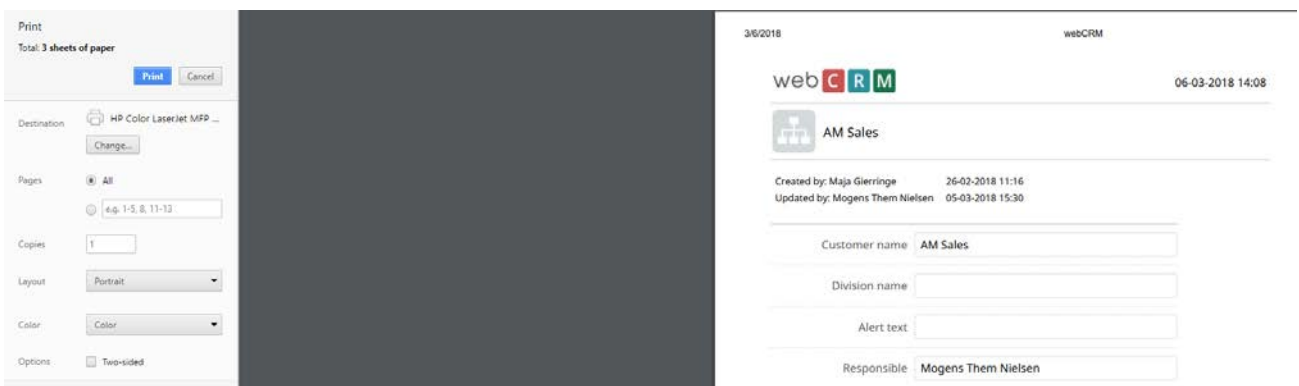
To find the person who requested his/her information sent use the front-page search box:



Then from the person view click the print icon:



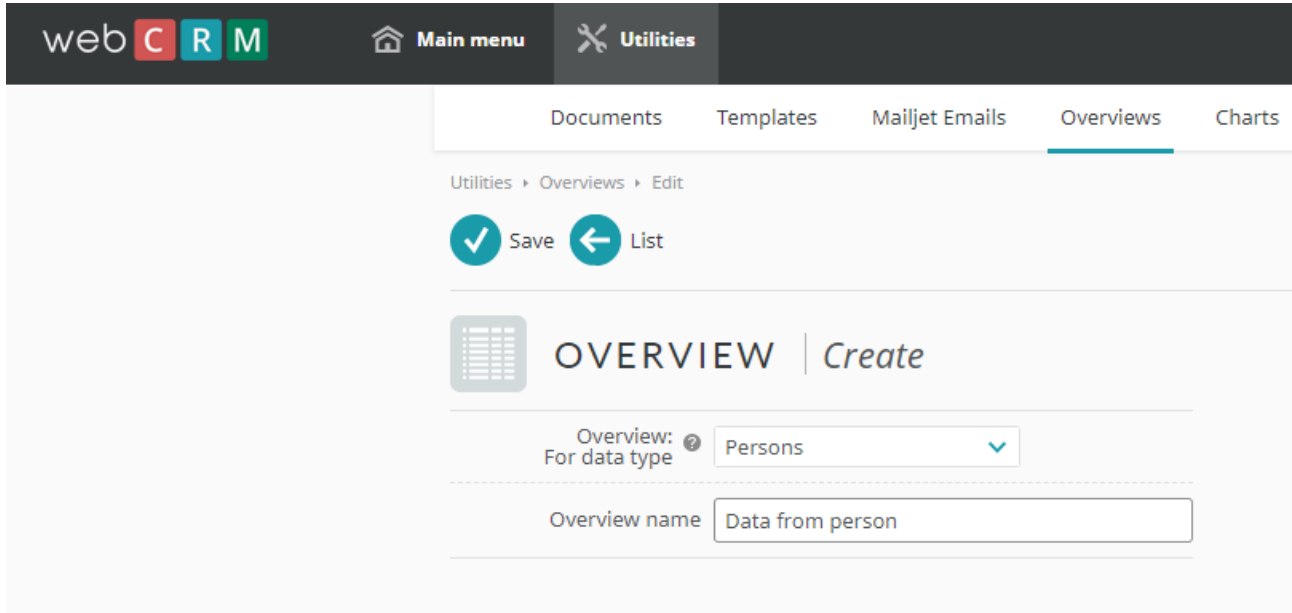
From here it is possible to print out the data of the person and save the data as a PDF document that can sent out afterwards. Note that this PDF document does not allow for customizing the design as the PDF template editor does:



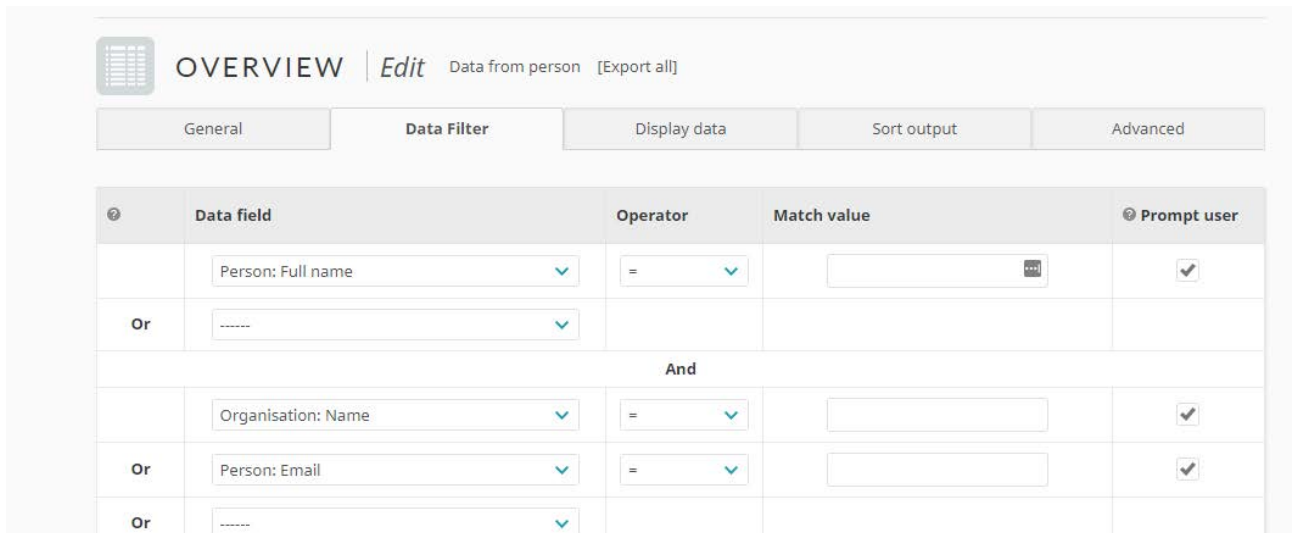
Exporting to Excel

Exporting to Excel - in case of the data needing to be read by a machine – requires creating an overview from which the data can be exported to Excel.

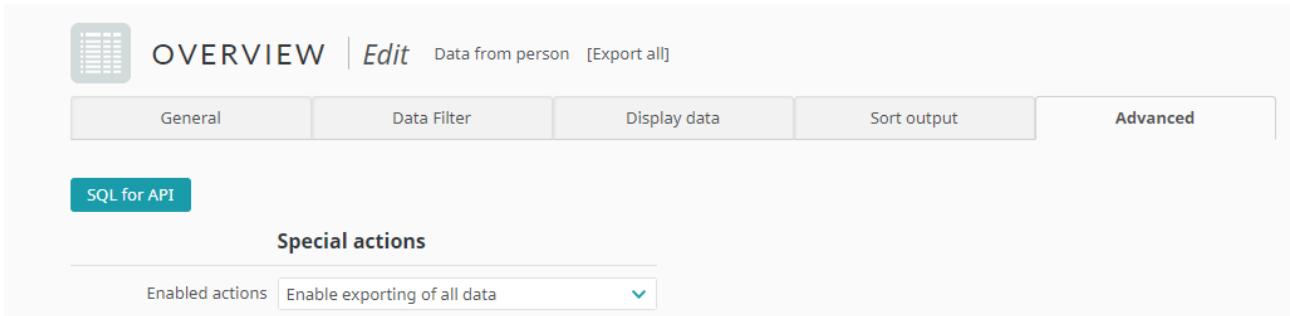
To create an overview, go to utilities/overviews of data type “Person”:



Then the overview as configured to filter by person name and e.g. Organisation name and/or “person email”. Make sure to check “Prompt user” for all filters. Example:



Once the filter is setup accordingly it is important that "Enable exporting of all data" is chosen from the Advanced tab:



Display data from the "Display data" tab and export all data by clicking the eye icon and then "Export all data fields":

