

Installation and Configuration Guide cc|crm gdpr process and data package

Status 13.06.2018 10:32

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Table of Contents

1 INTRODUCTION..... 3

2 CORE FEATURES 4

3 INSTALLATION..... 5

3.1 LICENSING..... 5

3.1.1 TRIAL MODE..... 5

3.1.2 PAYED MODE 6

3.2 CHECK WORKFLOWS 6

3.3 CONFIGURE SCHEDULER 6

4 CONFIGURATION..... 7

4.1 DEFAULT CONFIGURATION 7

4.2 SECURITY 7

4.3 GDPR COCKPIT..... 7

4.4 DEFAULT DATA 7



1 Introduction

The GDPR package provides the tools for a GDPR ready CRM system

General Data Protection Regulation

Legitimate Basis*	Bestehender Vertrag
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Purposes	
Name ↑	
Kundenbetreuung	

Data Origin*	Prize Game
Source Campaign*	Messe Wien

Recipients	
Recipients ↑	Recipients category
Cosmo Consult	Part Of The Group
Testfirma	Part Of The Group

Expiration Date	3/15/2020
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Consents		
Type ↑	Reason For Co...	Created On
Give Consent	Newsletterman...	1/23/2018 12:00



2 Core Features

The core feature of the CRM GDPR package are:

- ▶ Right to Access – Reports which are covering all default data of contacts and leads.
- ▶ Right to be Forgotten – A powerful logic which controls the automated deletion of leads and contacts.



3 Installation

3.1 Licensing

The GDPR solution is only working, if a valid license file is available. This can be established in two ways. First you can use the trial mode to elaborate the functionality of the package for 30 days or second, you purchase a valid license file through our sales channel which will then be sent to you.

3.1.1 Trial Mode

To give the best value out of the trial, the trial is not automatically started after the solution is imported. The 30 day trial can be started as you wish to. So you can do the configuration at a time where it is the most suitable for you and then start the trial afterwards. To start a trial, do the following:

1. In CRM, navigate to Settings → Solutions
2. Open the FWI.CRM.DSGVO.Package solution (double click on the name)
3. Navigate to Configuration in the side bar
4. Click on the License tab on the top
5. Click on Start Trial

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Business-Software für Menschen

GDPR

Home License About

License Information

Information	Value
OrgID	17781480-b246-e811-80dc-00155d285763
License State	Trial
Number of Licenses	0
Expiration Date	5/23/2018

Start Trial Install License

Copyright © 2016 FWI Information Technology v. 1.0.0.0 FWI in den sozialen Medien:

3.1.2 Payed Mode

The payed mode of the package is started, if a valid license key and hash is entered. For doing this please navigate to the configuration page of the solution and click the „Install License“ button in the License Tab. After this a new screen is shown to enter the license key and hash.

After entering the valid license information, the GDPR package will switch to payed. You will be then able to use the functionality of the package as long as your license is valid. For checking the license state, please navigate to the license section in the configuration page of the solution.

3.2 Check Workflows

To make sure the workflows are activated, you have to check and enable the following workflows:

- ▶ Contact:
 - „Contact_Sync_Create_SetLegalJustification“
 - „Contact_Sync_Create/OnDemand_SetDefaultProcessingPurpose“
- ▶ Lead:
 - „Lead_Sync_Create_SetLegalJustification“
 - „Lead_Sync_Create/OnDemand_SetDefaultProcessingPurpose“

3.3 Configure Scheduler

To start the automated deletion process of contacts and leads, you have to configure a scheduler. If you don't want that the contacts and leads are deleted automatically, you don't need to define a scheduler or if already defined, delete it. Step 3 to 6 are not necessary, if a record already exists.

1. Open a advanced search window
2. Search for „Schedule parameters“
3. Create a new record
4. Enter a name (like „DeleteContactsAndLeads“)
5. Enter a start hour: Thats the hour of the day, when the process should run (24h) like 1 for 1 AM and 15 for 3 PM
6. Save
7. Click on Run Workflow in the ribbon
8. Select the „ScheduleParameter_DeleteContactAndLead“ workflow
9. Add → OK



4 Configuration

4.1 Default Configuration

To have a turnkey solution and enabling the users directly to use the functionality of the GDPR package, the solution is shipped with a default configuration. The solution is configured directly in following entities:

- ▶ Contacts
 - Right to Access
 - Right to be Forgotten (included linked Opportunities, Quotes and Appointments)
- ▶ Leads
 - Right to Access
 - Right to be Forgotten (including linked Opportunities, Tasks and Appointments)

4.2 Security

To provide the functionality to non-admin users, there is a security role called “GDPR_Base” included, which you can assign to your users.

4.3 GDPR Cockpit

To provide an easy overview over the GDPR relevant records, there are two dashboards included:

- ▶ GDPR Cockpit Contacts
- ▶ GDPR Cockpit Leads

You can configure them as default Dashboards.

4.4 Default Data

The installed default data for the legitimate basis entity and the purpose entity are available in german. You can rename the data or deactivate it, but please don't delete it.

