

# LetMC.com<sup>®</sup>

Letting & Estate **Agent** Software

## An Introduction to GDPR Features in LetMC Agent

*The content of this document is not legal advice. You should consult a legal advisor on your GDPR responsibilities.*

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## General Data Protection Regulations

Changes are being made to LetMC Agent to ensure that you (the controller of the data) can meet your obligations under the GDPR requirements.

The following sections will give you an overview of the changes that are being made when it comes to dealing with a client's data in line with the new GDPR requirements.

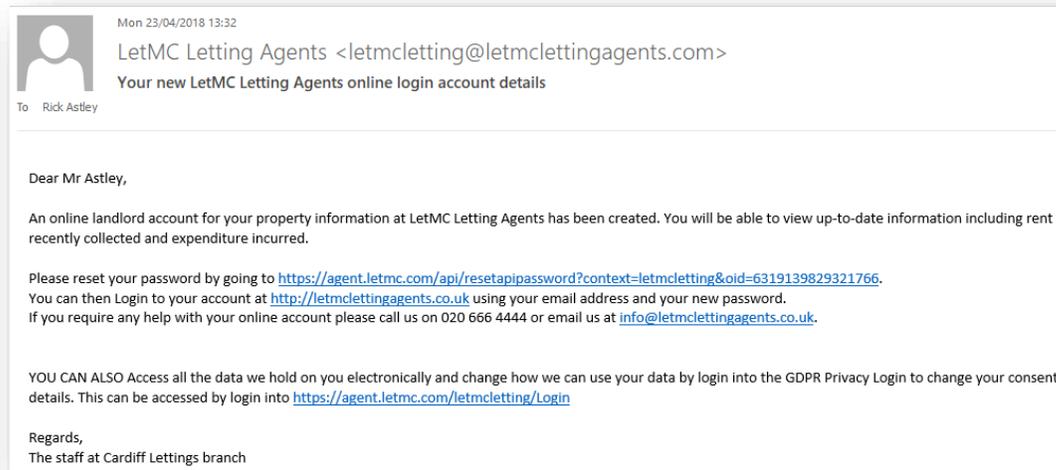
*These features will only be accessible to users of LetMC Agent, no changes will be made to LetMC Classic.*

## General Data Protection Regulations – Access

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

With the introduction of the GDPR requirements to LetMC Agent, you will now be able to provide an online account for every client on the system (Tenant, landlord, contractor, etc...), as long as they have an email address\*.

When a client is created on the system and an email address is present, the client will receive an email inviting them to set a password for their new online account.



The link within the email will take the client to a password creation page linked to LetMC Agent, which is used by the existing Landlord Portal.

The image shows a screenshot of a web form titled "Setup Login Credentials". The form is set against a dark blue background and contains several input fields. The first section is "Setup Security Questions", with a dropdown menu for "What was your First Car?" (selected "Mini") and a text input for "Father's Middle Name" (filled with "Paul"). Below this is a "Date of Birth" field with a calendar icon, showing "06/02/1966". The next section is "Reset Password", with two password input fields, each containing a series of dots. At the bottom of the form is a blue button labeled "Save Credentials".

Once an account is created the client is taken to a login screen that will log them in to their account on your company. The login form is the same form used when you login to your company on LetMC Agent.

On their first login, the client will be asked to answer “Yes” or “No” to any consent items that have been set (More on Consent in the next section).

UPDATE CONSENT

PLEASE ANSWER ALL OF THE FOLLOWING CONSENT QUESTIONS

- General Marketing  
Do you give Consent to the above? -- Please Select --  
If yes, should this be limited to a future date?
- FixFlo  
Do you give Consent to the above? -- Please Select --  
If yes, should this be limited to a future date?
- Landlord Specific Consent Item  
Do you give Consent to the above? -- Please Select --  
If yes, should this be limited to a future date?

Close UPDATE CONSENT

Once the client has answered the consent questions, they will be taken to their online account. The first page the client will see is the list of the consent questions they have just answered.

As with your version of LetMC Agent, there are tabs along the top of the screen, but the client will only have access to “How can we use Your Details?” and their personal information (The tab uses the person’s unique ID that is generated by LetMC Agent for the name).

If more than one client is linked to this online account (Either automatically based on CRM Groups or manually added by a user of LetMC Agent), additional tabs will appear along the top for each person linked.

How can we use Your Details? lan-104

UPDATE CONSENT

Drag a column header and drop it here to group by that column

Date	Consent for	Consent Given?	How was Consent Given?	Given Until
11:26AM	General Marketing	Yes	GDPR Login	
11:26AM	Landlord Specific Consent Item	Yes	GDPR Login	
11:26AM	FixFlo	No	GDPR Login	

1 10 items per page 1 - 3 of 3 items

To view their personal information, the client clicks on the tab to the right of “How can we use Your Details?”, in the image above this is named “lan-104”. Clicking on this tab will load a view that will be familiar to you, as a user of LetMC Agent. Any personal data that is held about this client is displayed to them through the traditional LetMC Agent views.

**Landlord Details**

Personal Details | Bank Details | Notes | CRM

Office Details	Landlord Name	Contact Details
ID lan-104	Title Mr	EEmail Address support@letmc.com
Managed by Cardiff Lettings	Forename Rick	Second Email Address
Default Service Type -- None Selected --	Middle Name	Mobile Phone
	Surname Astley	Mobile Phone Is Private <input type="checkbox"/>
	Nationality United Kingdom	2nd Mobile Phone
	Date of Birth	2nd Mobile Is Private <input type="checkbox"/>
		Emergency Out Of Hours Number
		Out Of Hours Phone Is Private <input type="checkbox"/>
		EEmail Letters <input type="checkbox"/>

None of the data held on this client is editable by them, they are restricted to “View Only” access on everything apart from Consent Questions, which they will be able to update at any time.

As well as the traditional tabbed detail view in the centre of the page, the client will also have the ladder menu on the left-hand side. The items here will match what you, as a user of LetMC Agent, see when accessing their profile. But, not all items will be displayed.

Applicant Tenant Details	
Print / Post / Store Documents	0
CRM Timeline	3
Notes	5
Current GDPR Consent	5
Historic GDPR Consent	5
Appointments	2
Area Criteria	
Special Requirements	0
Matching Properties	
Essential Facilities	1
Viewed / Unsuitable	1

In addition to accessing their data through the online account, the client will have a number of actions available to them. As with the LetMC Agent system, an “Action” menu is present, allowing the client to request a copy of all of their data and request that their data be deleted (Right to Erasure).

*\*If no email address is provided, the client will not be able to access their data or update their consent items. Consent is still required and must be done in person; over the phone or by hand and recorded correctly on the system by a user of LetMC Agent.*

## General Data Protection Regulations – Consent

*Consent cannot be bundled with other matter like general terms. Companies must demonstrate evidence that consent was given.*

As discussed in the previous section, a client is required to answer a number of questions on how their data is used.

Out of the box, there will be a number of system default “Consent Item Types”. But, you will be able to customise the item types with your own additions. Under “Object Types” there is a new item called “Consent Item Types”.

GDPR Consent Item Types

Question

Apply To: All People

Type of Question: Automated Property Alerts

Add

Export to Excel | Export to PDF

Drag a column header and drop it here to group by that column

Question	Apply To	Type of Question	Created	Removed	Removed By	
Agent Specific Consent Item	Agent	Other - Does not affect System Processes	29/03/18			Actions
Applicant Specific Consent Item	Lettings Applicants	Other - Does not affect System Processes	29/03/18			Actions
Buyer Specific Consent Item	Sales Applicant / Buyer	Other - Does not affect System Processes	29/03/18			Actions
Contractor Specific Consent Item	Contractors	Other - Does not affect System Processes	29/03/18			Actions
Exclusive Virgin Media Discounts	Lettings Applicants	Automated Property Alerts	27/03/18			Actions

5 items per page | 1 - 5 of 14 items

Consent items can be customised in three ways:

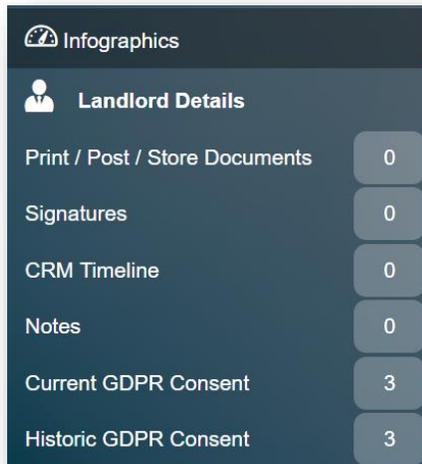
1. Question – Free form text box, no character limit.
2. Apply To – Choose who the consent item should apply to (All People, Tenant, Landlord, Contractor, Lettings Applicants, Vendor, Sales Applicant/Buyer, Solicitor, Agent)
3. Type of Question – Choose the system process that the consent item is for (Automated Property Alerts, 3<sup>rd</sup> Party Suppliers, Just a Statement (No question), Other (Doesn't affect a system process))

Consent items cannot be deleted, only removed from the consent form. When a consent item is removed, a note is added to the grid with the date and the user who removed it.



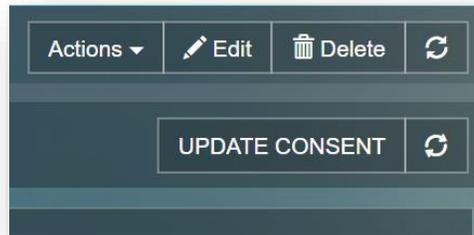
Question	Apply To	Type of Question	Created	Removed	Removed By	
Agent Specific Consent Item	Agent	Other - Does not affect System Processes	29/03/18	12/04/18 1:17PM	Bob Ross	Actions

Each client on the system now has two additional items in the ladder menu on their record: “Current GDPR Consent” and “Historic GDPR Consent”.



Infographics	
Landlord Details	
Print / Post / Store Documents	0
Signatures	0
CRM Timeline	0
Notes	0
Current GDPR Consent	3
Historic GDPR Consent	3

To record consent for a client, navigate to “Current GDPR Consent” on their profile. If consent has already been given, the grid will display their current choices. If no consent has given, the grid will be empty. On this page there is an “Update Consent” action, which, when pressed, will load the Consent Form.



Even if the client has given consent to items previously, the answers will all revert to “Please Select” and must be answered again.

A screenshot of a form titled 'UPDATE CONSENT'. At the top, there is a dropdown menu for 'How is this consent being given?' with the selected option 'Entered by Staff, Person Present'. Below this is the instruction 'PLEASE ANSWER ALL OF THE FOLLOWING CONSENT QUESTIONS'. There are three sections, each with a question and a date field: 1. 'General Marketing' with 'Do you give Consent to the above?' and 'If yes, should this be limited to a future date?'. 2. 'FixFlo' with 'Do you give Consent to the above?' and 'If yes, should this be limited to a future date?'. 3. 'Landlord Specific Consent Item' with 'Do you give Consent to the above?' and 'If yes, should this be limited to a future date?'. All dropdown menus are currently set to '-- Please Select --'. At the bottom right, there are 'Close' and 'UPDATE CONSENT' buttons.

The client must answer all Consent Items, with a “Yes” or “No”. In addition to this, the client may specify a date where the consent will expire and consent will need to be requested again.

When a user records consent on behalf of the client, the user can choose how consent has been given. The three options available are:

1. Entered by Staff, Person Present
2. Entered by Staff, Paper Form
3. Entered by Staff, Over Phone

*To ensure a clean audit trail, a note is created on the client stating when and by whom the consent items were updated.*

Once consent is recorded (Either for the first time or renewing consent), the consent answers are recorded under “Historic GDPR Consent”, which allows you to view the current consent answers and any historic answers.

Export to Excel    Export to PDF

Drag a column header and drop it here to group by that column

Date	Consent for	Consent Given?	How was Consent Given?	Given Until
1:40PM	Landlord Specific Consent Item	No	Entered by Staff, Person Present	
1:40PM	FixFlo	No	Entered by Staff, Person Present	
1:40PM	General Marketing	No	Entered by Staff, Person Present	
11:26AM	General Marketing	Yes	GDPR Login	
11:26AM	FixFlo	No	GDPR Login	
11:26AM	Landlord Specific Consent Item	Yes	GDPR Login	

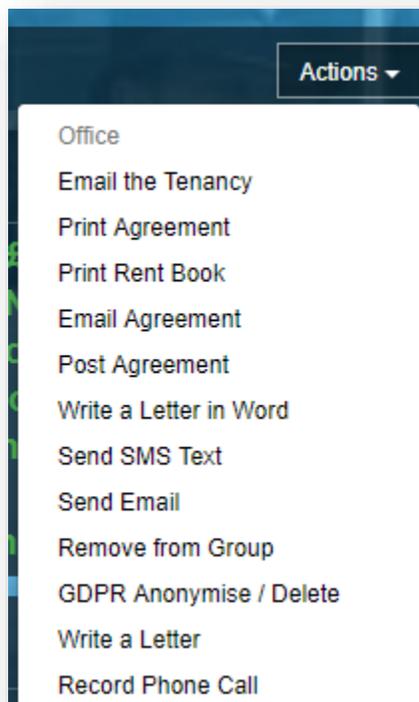
10 items per page    1 - 6 of 6 items

## General Data Protection Regulations – Erasure

*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.*

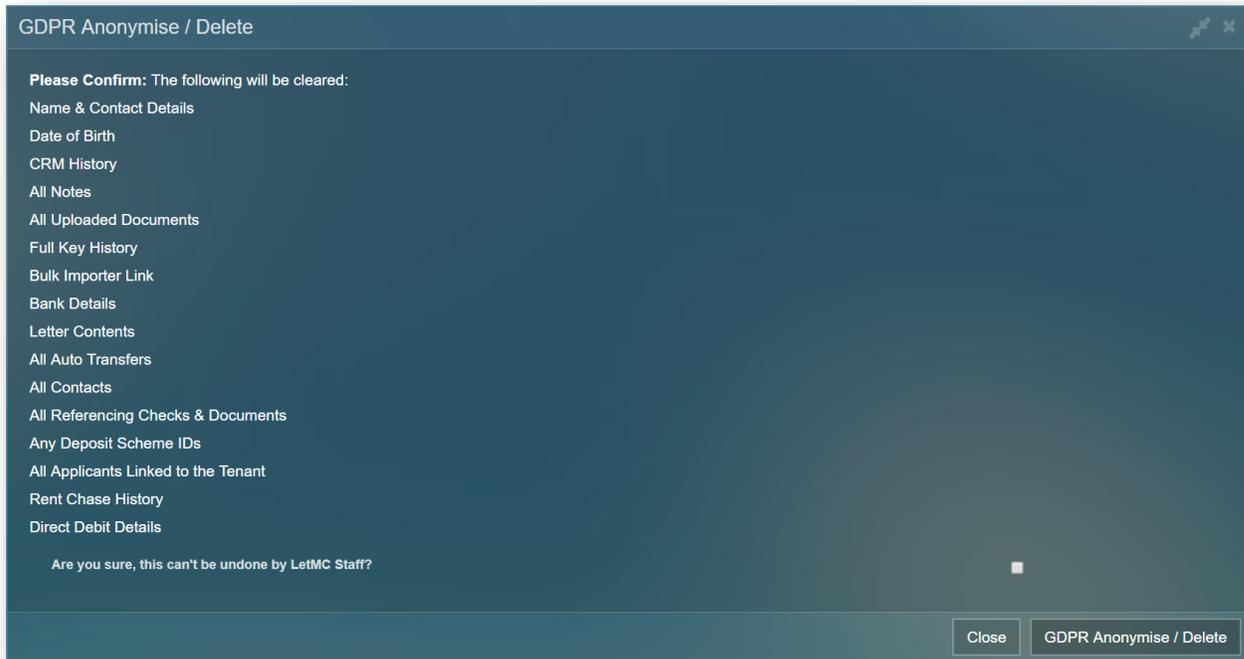
Each and every client on the system now has the right to request that their data be deleted (Unless there is a legitimate business reason for keeping a record).

To aid with this requirement, we have introduced a new “GDPR Anonymise/Delete” action on every client.



*This action is irreversible and should only be used when requested. As a failsafe, it requires three clicks to anonymise a record (Click “GDPR Anonymise/Delete” > Tick the box confirming you wish to anonymise the record > Click “GDPR Anonymise/Delete” in the pop up to complete the action).*

For every client record on the system, a particular set of data will be deleted (Please see list of data at end of the document).



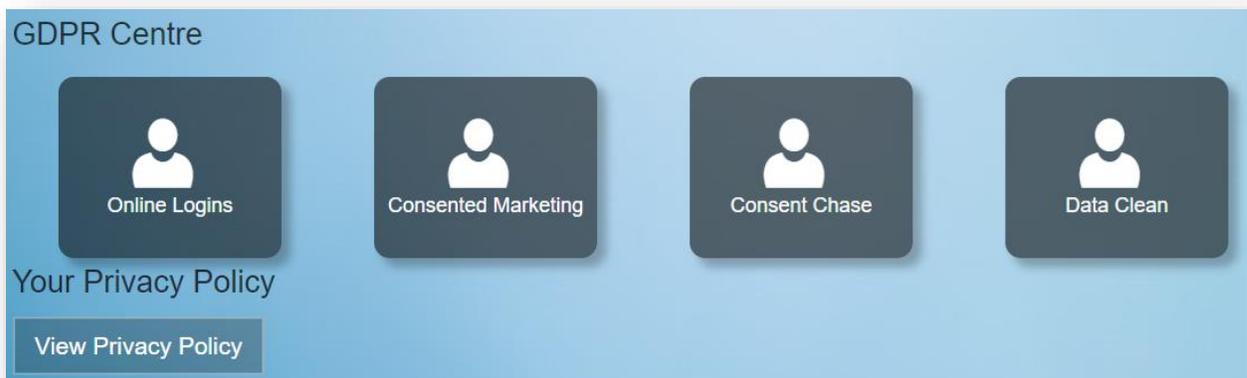
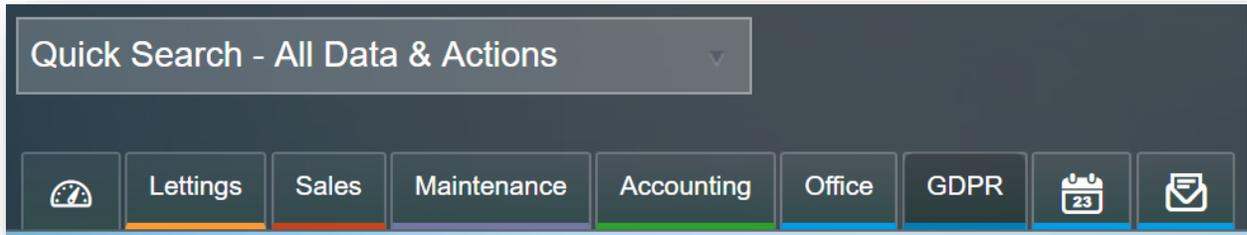
Each item listed in the pop up will either have any words replaced by “Anonymised” (All notes are deleted and replaced with an audit note identifying who anonymised the record and when).

Emails are not included in this action and instead can be deleted individually should the client request a particular email be deleted.

## General Data Protection Regulations – A Helping Hand

As well as introducing new features to aide you in meeting your obligations as a data controller, we have also been working on tools that allow you to monitor anything GDPR related.

There is now a dedicated “GDPR” tab where all of the tools will be available to more easily allow you to stay on top of any GDPR issues.



## Online Logins

We have moved the “Online Logins” item from “Lettings” into the “GDPR” tab. From here, you will be able to Enable, View, Edit and Disable GDPR logins. The usage and functionality hasn’t changed at all from our traditional “Online Logins” functionality.

CRM GDPR Logins

Export to Excel | Export to PDF

Drag a column header and drop it here to group by that column

User	CRM Group	Login Enabled	EMail Address	Has Set Security Questions	Reset Password	Logged In	Last GDPR Consent Given	Actions
Emma Jackson	crm-783	Yes	emma.jackson@letmc.com	Yes				

10 items per page | 1 - 1 of 1 items

## Consented Marketing

View a report of people who have consented to a consent item of your choosing. This report could be used if you want to send a mass email to all of your landlords, or if you use a third-party company and wish to send the details of the clients who have consented to having their data shared.

Consented Marketing

Export to Excel | Export to PDF

Drag a column header and drop it here to group by that column

Name	EMail Address	Mobile Phone	Address Line 1	Address Line 2	Address Line 3	Address Line 4	Postcode	Actions
Mr Rick Astley	support@letmc.com	07711223344	LetMC,	8th Floor Capital Tower	Greyfriars Road	Cardiff	CF10 3AG	
Mr Multiple Consent Landlord	multiplell@sharklasers.com		LetMC	8th Floor Capital Tower	Greyfriars Road	Cardiff	CF10 3AG	
Mr Multiple Consent Landlord 2	multiplell@sharklasers.com		LetMC	8th Floor Capital Tower	Greyfriars Road	Cardiff	CF10 3AG	

## Consent Chase

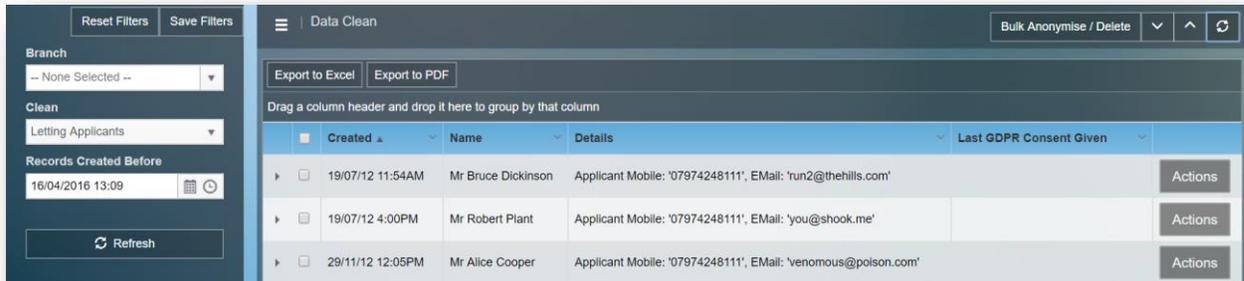
To help you keep on top of who has or hasn't given consent, the Consent Chase tool will allow you to check for clients who gave consent before a certain date or for those who have yet to provide consent.

The screenshot displays the 'Consent Chase' tool interface. On the left, there is a sidebar with filter options: 'Branch' (set to '-- None Selected --'), 'People' (set to 'Landlords'), 'No Consent Given ONLY' (checked), 'Consent Given Before' (set to '16/10/2018 00:00'), and 'Exclude Chased Since' (set to '09/04/2018 00:00'). A 'Refresh' button is at the bottom of the sidebar. The main area shows a table with columns: 'Created', 'Name', 'Details', 'Last GDPR Consent Given', 'Last Consent Chase', 'Address Line 1', and 'Postcode'. A single row is visible for 'Mr Rick Astley' with a creation date of '12/04/18 10:16AM' and a last consent date of '16/04/18 9:36AM'. The table includes pagination controls (1 of 1 items) and a 'Send Login Request' button.

Created	Name	Details	Last GDPR Consent Given	Last Consent Chase	Address Line 1	Postcode	Actions
12/04/18 10:16AM	Mr Rick Astley	Landlord at 'Please Specify, XX99 9XX'	16/04/18 9:36AM		LetMC,	CF10 3AG	

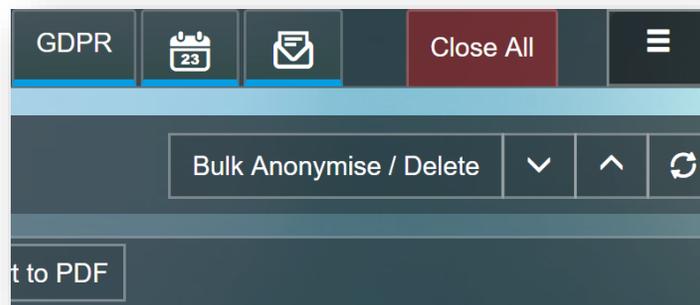
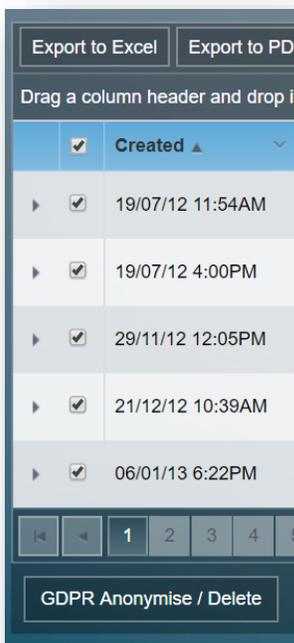
## Data Clean

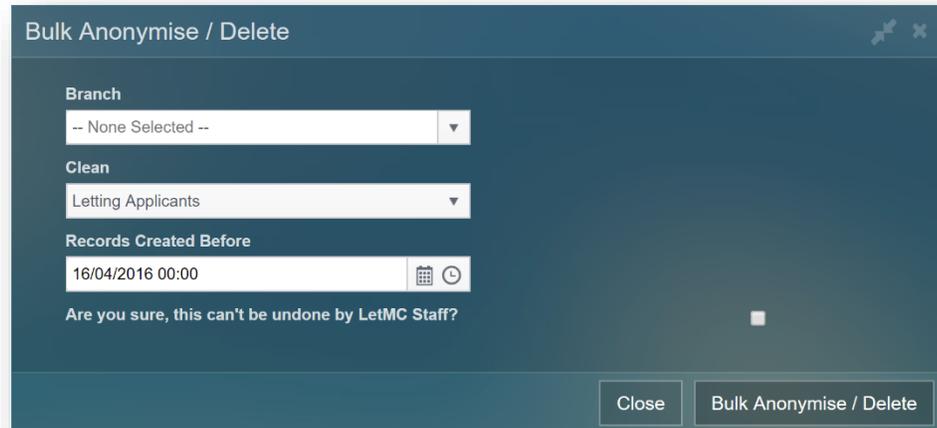
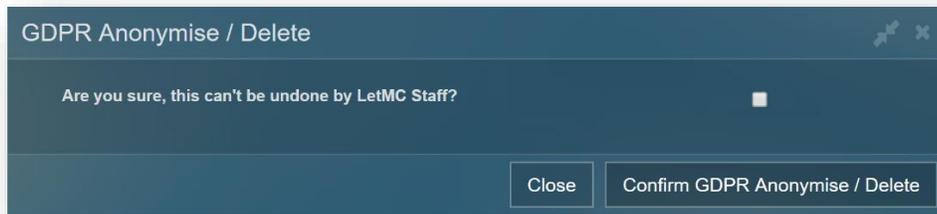
To aid you in ensuring you are only keeping useful, up to date information, the Data Clean tool allows you to report on lettings or sales applicants created before a certain date (Sales Applicants who have been converted into a buyer will not be displayed).



Not only are you able to report on applicants created before a certain date, you are also able to perform a GDPR Anonymise/Delete action (As mentioned in a [previous](#) section). Two actions are available to you:

- Bulk Anonymise/Delete – Anonymise or delete an applicant record if created before a certain date.
- GDPR Anonymise/Delete – Select multiple applicant records to anonymise or delete.





Anonymise multiple records with the use of the multi select or bulk actions on Data Clean.

You can still anonymise individual records by going to the Actions menu on the client and selecting "GDPR Anonymise/Delete".

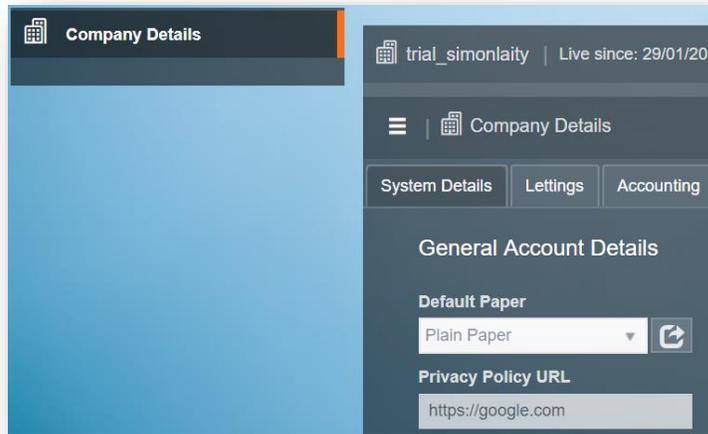
## Stats

For a quick visual overview of your current GDPR status, a report driven Stats info panel is located on the GDPR tab. Clicking on each individual set of data will open the corresponding report.

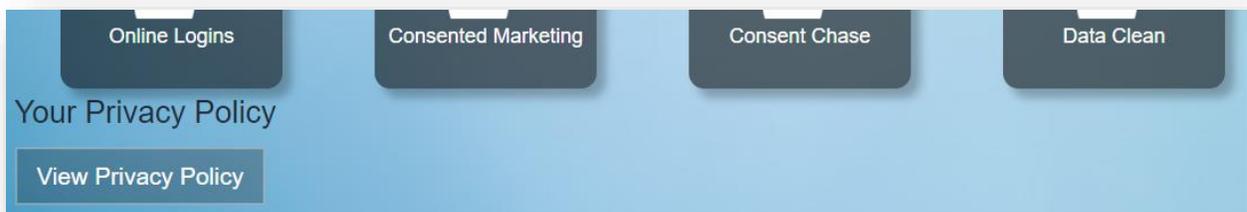


## Privacy Policy

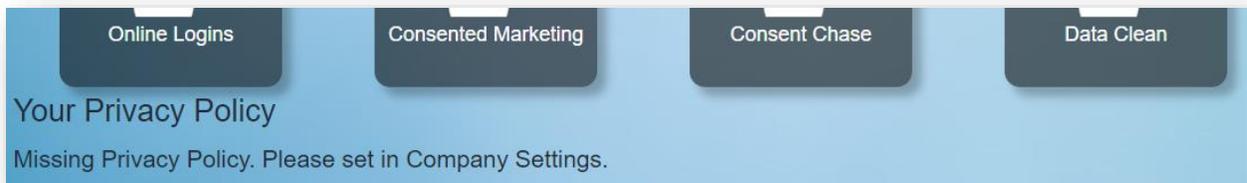
Add a link to your Privacy Policy page so that you have it to hand should a client have any questions regarding your compliance with GDPR.



The screenshot shows the 'Company Details' settings page for a user named 'trial\_simonlaity' who has been live since 29/01/201. The page has a dark blue header with a hamburger menu icon and the text 'Company Details'. Below the header, there are three tabs: 'System Details', 'Lettings', and 'Accounting'. The 'System Details' tab is selected. Underneath, there is a section titled 'General Account Details'. It contains two fields: 'Default Paper' with a dropdown menu set to 'Plain Paper' and a share icon, and 'Privacy Policy URL' with a text input field containing 'https://google.com'.



This screenshot shows a light blue horizontal bar with four dark blue buttons at the top: 'Online Logins', 'Consented Marketing', 'Consent Chase', and 'Data Clean'. Below the buttons, the text 'Your Privacy Policy' is displayed. Underneath that, there is a dark blue button with the text 'View Privacy Policy'.



This screenshot shows the same light blue horizontal bar with four dark blue buttons at the top: 'Online Logins', 'Consented Marketing', 'Consent Chase', and 'Data Clean'. Below the buttons, the text 'Your Privacy Policy' is displayed. Underneath that, the text 'Missing Privacy Policy. Please set in Company Settings.' is shown.

If a link has been added to the field under Company Settings, a button to the website/document is displayed. If no link is provided, a prompt is displayed. A link to your privacy policy is also included in the emails sent to clients when setting up their online account.

## List of Data Items Anonymised/Deleted

### Applicant

- Delete the Applicant Record
- Delete all Referencing Checks & Documents
- Delete all Letters

### Tenant

- Name & Contact Details
- Date of Birth
- CRM History
- All Notes
- All Uploaded Documents
- Full Key History
- Bulk Importer Link
- Bank Details
- Letter Contents
- All Auto Transfers
- All Contacts
- All Referencing Checks & Documents
- Any Deposit Scheme IDs
- All Applicants Linked to the Tenant
- Rent Chase History
- Direct Debit Details

### Landlord

- Name & Contact Details
- Date of Birth
- CRM History
- All Notes
- All Uploaded Documents
- Full Key History
- Bulk Importer Link
- Bank Details
- Letter Contents
- All Auto Transfers
- All Contacts
- All Referencing Checks & Documents
- Any Deposit Scheme IDs
- License Number
- Links to LR Searches