LetMC.com®

Letting & Estate Agent Software

LetMC Agent GDPR – First Time Use

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

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 is a quick guide for first use when these features are released.

If you haven't yet been given the feature overview, please get in touch with our Support/Sales/Marketing (Pick one) and ask for "An Introduction to GDPR Features in Agent".

This guide applies only to LetMC Agent, the latest GDPR features will not be available on LetMC Classic.

General Data Protection Regulations – Migration

In order to help you comply with the new regulations, as part of the "Right of Access" right under GDPR, every person on the system will have an online account.

For this to be possible, part of the work during the release is to create an online account for every client on the system. This also includes anyone who already uses our Standard online account. Their account will be converted into a GDPR online account.

This conversion will have no effect on your clients' ability to access their details through their Standard online account.

General Data Protection Regulations – Anonymisation/Deletion

Your first port of call when logging into LetMC Agent after the release should be the "Data Clean" tool on the "GDPR" tab.

With the use of this tool you are able to clean up old sales and lettings applicants that you have accumulated over the years. You may wish to keep records created after a certain date, in which case you should choose your "Created Before" date carefully (If using the "Bulk Anonymise/Delete" action).

Alternatively, you can select multiple records based on certain criteria and anonymise/delete by using the "GDPR Anonymise/Delete" action at the bottom of the grid. There is also a third option available to you as an action on the individual record of the client.

General Data Protection Regulations – Defining Consent Items

Before you can gain consent, you must first define what you wish to gain consent for.

To define your consent questions/items, navigate to "Object Types" and from here open up "Consent Item Types". You will see a number of items already in the grid. These are default statements that we have added. You can remove these at any time if you do not wish to use them.

If you want to update the wording of the default statements (Or any of your custom consent items), you must remove them and add them again. Consent items of type "Automated Property Alerts" cannot be removed.

On the "Consent Item Types" page, there are three fields for completion:

1. Question - The wording of the consent item
2. Apply To - To whom should the consent item apply
3. Type of Question - What does the consent item relate to (3rd Party Supplier, a Statement or Other, which doesn't affect any system processes)

Once your consent items have been added, when a client logs into their online account, they will be asked to provide answers to all applicable consent items (Which you have added).

General Data Protection Regulations – Acquiring Consent

Once you have conducted a clean-up of old and unwanted records (Applicants only), you can now go about seeking consent from all clients on the system.

Under the "GDPR" tab is the "Consent Chase" tool, which will list all clients of a certain type given a set of criteria.

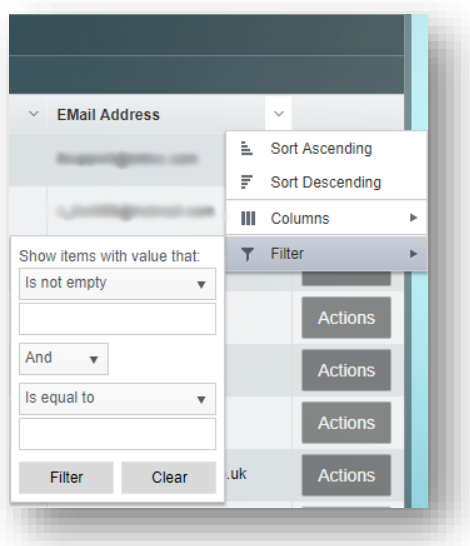
The criteria available to filter by are:

- Branch
- People (Client Type)
- No Consent Given ONLY – Show only clients who have yet to give any consent.
- Consent Given Before – Show only clients who have given consent, before a certain date.
- Exclude Chased Since – Show only clients who have been chased, since a certain date.

For first time use, you'll only have interest in clients who have yet to provide consent (Which will be the majority of your clients). Using the "Consent Chase" tool, tick the "No Consent Given ONLY" filter to show only clients who need to provide consent.

Once you have filtered your clients, you can send a consent request email to each one by selecting multiple records and clicking the "Send Consent Request" action at the bottom of the grid. To aid in only showing clients with an email address, you should filter the grid so that it only shows records that have an email address.

To do this, click on the downwards arrow on the "EMail Address" column; Filter; Choose "Is Not Empty" and click "Filter".



If a client hasn't provided an email address, consent should be sought out via another method.

New Clients

When adding a new client to the system, the system will automatically send a consent request email to the client (If this feature is turned on under Company Settings. It is on by default) when an email address is included on their record. An email will not be sent automatically if an email address is added when editing the record.

No Email Received

If a client has not received an automatic email when they were added to the system, an account setup email can be sent using the Consent Chase tool.

Standard & GDPR Online Accounts

With the introduction of the GDPR online accounts, we have linked the current (Standard) online accounts with the new GDPR online accounts. Not all of you will use the Standard online accounts, this won't affect you at all. The GDPR online accounts can be used without ever having used the Standard online accounts.

If you have made use of the Standard online accounts, any existing client accounts will automatically be migrated across to a GDPR online account. Clients will still be able to log into their Standard online account, but they will also now be able to access their new GDPR online account with the same login details.

Logging In

Once a client has created their online account (By setting their security questions and password), they can log into their personal account via a unique URL to your company.

The URL will look like this: