

Global 3000 Service Pack Note

General Data Protection Regulation

Author	DCP	
Project	ZM60_000514.docx	
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INTRODUCTION

The requirement is to update Global 3000 V6.0 to assist end users to become GDPR compliant.

The EU's General Data Protection Regulation (GDPR) applies from 25 May 2018. It supersedes the UK Data Protection Act 1998. The new law brings a 21st century approach to data protection. It expands the rights of individuals to control how their personal information is collected and processed, and places a range of new obligations on organisations to be more accountable for data protection.

NOTE: When used as intended these changes provide options that alongside procedures managed outside of Global 3000 allow a business using Global 3000 to comply with the General Data Protection Regulation (GDPR). The existence of these changes do <u>NOT</u> imply that a business using Global 3000 is GDPR compliant.

Note, named corporate 'business to business' data is classed as personal data and therefore has to be processed in line with the GDPR.

The changes are as follows:

New system parameters have been created which enable data protection controls and allow the location of the data retention policy and privacy notice documents to be specified, these can then be viewed whilst creating/amending Customer or Supplier contact details.

A new 'Data Protection' window now appears immediately after a Customer or Supplier contact record is created or updated. This allows users to record and update the privacy and data retention options for the contact.

A new 'Data Protection Maintenance' option has been added to system parameters (within the administration options). This allows users to manage the data protection preferences for contacts (either individually or in bulk).

When data protection controls are initially enabled, the system prepares the data by assuming that **none** of the existing contacts have opted in to data retention, receiving marketing material, sharing information with third parties or being aware of the privacy notice. The new 'Data Protection Maintenance' function can then be used to update the contacts in bulk to reflect their correct status.

Contacts and addresses can be marked for anonymization, this will then take place when the current period is closed.

A new phase (Data Protection Processing) has been added when a Debtors Ledger or Creditors Ledger period is closed. This handles the automatic anonymization of contacts and addresses (in cases where data retention is date limited or simply not confirmed) and ensures the contact details held on Global 3000 SOP and POP orders is anonymized as required. This will inevitably cause close period to take extra time to complete.

The new 'Data Protection' contact details are processed via a DLM to enable resellers to access it.

In addition new a reseller intercept point has been added so that reseller software can detect when a contact is added, amended or deleted and when a contact is anonymised.

The new intercept will be created as follows:

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Name: CUI%CONTACT-UPDATE-INTERCEPT. When the routine is called it is passed the following details.

The module id which is set to either 'DL' or 'CL'.

The relative record number of the contact record.

A flag that indicates the mode. The flag is set as follows. 'C' if a contact has been created (or inserted), 'M' if the contact has been amended, 'D' if it has been deleted or 'A' if the contact details have been anonymised.

Bank Details

Whilst bank details relate to a customer or supplier account rather than an individual, changes have been made for security reasons. The changes are that if an account is marked as status 'inactive' any bank details will be removed when the current period is closed.

DOCUMENTATION CHANGES

System Parameters – Administration Parameters



Data Protection
SettingsThese settings are used to enable the capture of data protection details for (customer
and supplier) contacts.

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Data Protection
Maintenance(Only available if data protection controls are enabled) This function allows you to
manage the data protection preferences for contacts (either individually or in bulk).

System Parameters (Administration) - Data Protection Settings

Global-Dev-VM - P2 - System Parameters	
<u>File Run S</u> ettings <u>O</u> ptions <u>H</u> elp	
Data Protection Settings	×
Details	
When used as intended these settings provide options that when used alongside procedures managed outside of Global 3000 allow a business using Global 3000 to comply with the General Data Protection Regulation (GDPR).	
The existance of these settings does NOT imply that a business using Global 3000 is GDPR compliant.	
When data protection controls are enabled extra data protection settings are maintained whenever a contact is created or updated. Warning, once enabled this cannot be disabled.	
Settings	
Z Enable data protection controls?	
Data Retention	
Data Retention Policy	Clear
C:\Global\Documents\Data_retention_policy.docx	Browse
	View
Privacy Notice	
Privacy Notice	Clear
C:\Global\Documents\Privacy_notice.docx	Browse Vie <u>w</u>
	Close
Partition 2 Computer 1D 16:34:31 dcp LM52AC/DP	EDT NUM at

This window appears when you select 'Data Protection Settings' from the administration parameters menu.

Purpose	This window allows you to manage the data protection settings.	
Notes	• These settings can be protected via an authorisation point (LM_D_PROT1).	
	• In multiple company systems these settings apply to all companies.	
	• When used as intended these settings provide options that alongside procedures managed outside of Global 3000 allow a business using Global 3000 to comply with the General Data Protection Regulation (GDPR). The existence of this function does <u>NOT</u> imply that a business using Global 3000 is GDPR compliant.	

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The prompts are:

Enable data protection controls	Set this to trigger the system to prompt for data protection settings when contacts are created and amended. When this is enabled (alongside procedures managed outside of Global 3000) it can be used as an aid towards compliance with the General Data Protection Regulation (GDPR). It should be noted that enabling this setting in no way means that the data is itself GDPR compliant.
Note	When this is enabled there is an amount of data set-up performed by the system, this may take a short while to complete. The set up assumes that none of the existing contacts have opted in to data retention, receiving marketing material, sharing information with third parties or being aware of the privacy statement. The new 'Data Protection Maintenance' function can then be used to update the contacts in bulk to reflect their correct status.
Warning	Once data protection controls have been enabled they cannot be disabled.
Data retention policy	(<i>Only available if data protection controls are enabled</i>) This is a link to the data retention policy document, it should be selected using the associated 'Browse' button. Buttons are also available to clear the link and view the document.
Privacy notice	(<i>Only available if data protection controls are enabled</i>) This is a link to the privacy notice document, it should be selected using the associated 'Browse' button. Buttons are also available to clear the link and view the document.

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System Parameters (Administration) – Data Protection Maintenance – Contact Selection.

Global-Dev-VM	- P2 - System Parameters	and the second se		
e <u>R</u> un <u>S</u> ettings	s <u>O</u> ptions <u>H</u> elp			
Data Protectio	n Maintenance - Contact Selection			
Information	maintenance - contact selection			
This window a	llows you to build a list of contacts to	he processed when you proce the		
'Next >' butto	n The 'Select List'/'Deselect List' but	ons can be used multiple times		
inconjuction w	ith the 'Filters' button to build the over	erall list of contacts to process.		
	••			
Customer	Name	Contact	Retain Until	Selected
ANDPOO1	Anderton Lta	Daniel Carter		<u> </u>
RI AKOO1	Riskelock Insurance Brokers			
BLAK001	Blakelock Insurance Brokers	Fred Bloggs	02/06/2005	
BROW001	Brownhouse of Preston	Peter Waites	02,00,2000	
DESI010	Design Graphics Ltd	Angela Osborne		*
GILE001	Gilera Cartoleria	Angelo Pilletio		
NEAL015	A Neal & Sons	Alex Neal	31/12/2020	1
PHAN025	Phang Stationery Company	Hasaw Kawongo		-
READ001	Reading Stationery	Mr Smith		
UNIT001	United Office Supplies	Sara Carter-Watson		
WATK005	Geo Watkins	Sarah Kelly		
WATS010	Watsons Pic	Lillian Wabb Rob Jones		, _
WAISUIO	Watsons Fic	Bob Jolles		······
				*
				×
Dotaile				
Croated	16/04/2018			
Createu	10/04/2018 Don	Desition Accounts Clark		
Dhana				
Mobilo	07720087558			
Mobile	01123901330	uan.pentoid@kernaged	s.com	
<u>F</u> ilters	<u>C</u> lear Filters	Deselect Data Protection	< <u>B</u> ac	k <u>N</u> ext >
Select L	ist Deselect List	Anonymise View Selected		
rtition 2 Comput	ter 1D		16:42:14 dcp LM52AC/D1	DSP NUM

This window appears when you select 'Data Protection Maintenance' from the administration parameters menu. Before it is displayed you are prompted to select the type of contacts you wish to process (e.g. customer contacts or supplier contacts).

- **Purpose** This window allows you to manage the data protection preferences for contacts (either individually or in bulk). Processing takes place in two phases, first contacts are selected for update; then (when the 'Next' button is pressed) the selected contacts can be updated in bulk (e.g. anonymised or opted in/out of marketing etc.).
 - This function can be protected via an authorisation point (LM_D_PROT1).
 - When used as intended this function provides options that alongside procedures managed outside of Global 3000 allow a business using Global 3000 to comply with the General Data Protection Regulation (GDPR). The existence of this function does <u>NOT</u> imply that a business using Global 3000 is GDPR compliant.

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The prompts are:

Customer/Supplier	(Display only) The customer/supplier code.
Name	(Display only) The customer/supplier name.
Contact	(Display only) The contact name.
Retain Until	(Display only) The date the contact is to be retained until.
Selected	(Display only) This is set when the contact is selected for further update.

The buttons are:

Filters	Press this to control the contacts listed in the window, for example to limit the list to only those that have opted in to the data retention policy or to include contacts created between specific dates.	
Clear Filters	When this is pressed the filters criteria is reset back to its default state, which is to include all contacts.	
Select/Deselect	Press this to select or deselect the currently hi-lighted contact.	
Select List	Press this to select all contacts that meet the current filter criteria.	
Deselect List	Press this to deselect all contacts that meet the current filter criteria.	
Note	The 'Select List' and 'Deselect List' options can be used multiple times with different filter criteria to build an overall list of contacts to be processed.	
Anonymise/Restore	Press this to toggle between the currently hi-lighted contact being marked for anonymization or not ('Restore'). Anonymization takes place when the current period is closed and removes the contacts name, telephone/fax/mobile numbers and email address.	
Notes	If all contacts at the associated address (and the address is not marked as being one of the main addresses (invoice, payment statement or delivery) for the account) have been anonymised the address itself will also be anonymised.	
	If you mark a contact for anonymization this overrides and removes any 'retain until date' settings the contact may have configured.	
	Contacts that have been anonymised are physically deleted at year end.	
Data Protection	When this is pressed you can view and amend the data protection settings for the currently hi-lighted contact.	
View Selected	When this is pressed all currently selected contacts are listed (in a separate window) regardless of any existing filters.	
<back< th=""><th>Remove all selections and return to the contact type selection menu.</th></back<>	Remove all selections and return to the contact type selection menu.	
Next>	Press this to process the list of selected contacts.	

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Data Protection Maintenance Contacts Selection – Filters Window

💽 Global-Dev-VM - P2 - System Parameters	
<u>File R</u> un <u>S</u> ettings <u>O</u> ptions <u>H</u> elp	
Contact Filters	X
 Contact Details Include contacts of inactive accounts? Include contacts of active accounts? Include contacts of suspended accounts? 	
Include contacts created From To	
Data Protection	
Include contacts received via a third party?	
 Include contacts that are 'opted in' to the data retention policy? Include contacts that are NOT 'opted in' to the data retention policy? Include contacts that have agreed to have their details shared with third parties? Include contacts that have NOT agreed to share their details with third parties? 	
Include contacts that have agreed to receive marketing material?	
 Include contacts that are aware of the privacy notice? Include contacts that are NOT aware of the privacy notice? 	
 Include contacts whose details have already been shared with a third party? Include contacts whose details have never been shared with a third party? 	
Reset	<u>Cancel</u> <u>Apply</u>
Partition 2 Computer 1D 16:43	:24 dcp LM52AC/DF

This window appears when you press the 'Filters' button in the 'Data Protection Maintenance – Contact Selection' window.

Purpose This window enables you to enter criteria by which you can restrict the list of contacts displayed in the window.

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Note Selections made via the 'Filters' button are only retained until you exit Data Protection Maintenance, they are not saved.

The prompts are:

with third parties?

with third parties?

have agreed to

receive marketing

Include contacts that

are NOT aware of the

privacy notice?

Include contacts

whose details have

already been shared with a third party?

material?

Include contacts of
inactive accounts?Set this if you want to include contacts for accounts with a status of 'inactive' in the
list.Include contacts of
active accounts?Set this if you want to include contacts for accounts with a status of 'active' in the list.

Include contacts of *(Only applies to customer contacts).* Set this if you want to include contacts for accounts? accounts with a status of 'suspended' in the list.

Include contacts If you want to limit the list of contacts by their creation date, enter a range of dates here. Any contacts with a creation date outside the range will be excluded from the list.

Include contacts Set this to include contacts supplied by a third party. For example on a sales order which is to be delivered directly to a consumer rather than to the customers standard delivery address.

Include contacts that are 'opted in' to the data retention policy? Set this to include contacts that have confirmed that they agree to their personal information being retained for the purposes outlined in the data retention policy. Note, if you set this contacts that originally opted in but subsequently opted out will be excluded from the list.

Include contacts that
are NOT 'opted in' to
the data retention
policy?Set this to include contacts that have not confirmed that they agree to their personal
information being retained for the purposes outlined in the data retention policy. Note,
if you set this contacts that originally opted in but subsequently opted out will also be
included in the list.

Include contacts that have agreed to have their details shared

Include contacts that have NOT agreed to share their details

Include contacts that Set this to include contacts that have agreed to receive marketing material.

receive marketing material?

Include contacts that Set this to include contacts that have **not** agreed to receive marketing material. **do NOT agree to**

Include contacts that are aware of the privacy notice? Set this to include contacts that have confirmed that they are aware of the privacy notice.

Set this to include contacts that have **not** confirmed that they are aware of the privacy notice.

Set this to include contacts whose details have already been shared with at least one third party.

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Include contacts whose details have never been shared with a third party? Set this to include contacts whose details have never been shared with at least one third party.

The buttons are:

- **Reset** When this is pressed the filters criteria is reset back to its default state, which is to include all contacts.
- **Cancel** This exits the window and returns to the contact selection window. Any changes made to the filters are ignored.
- **Apply** This exits the window and returns to the contacts selection window which is then refreshed based on the criteria entered here.

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System Parameters (Administration) – Data Protection Maintenance – Contact Processing

Global-Dev-VM - P2 - System Parameter	rs			
ile <u>R</u> un <u>S</u> ettings <u>O</u> ptions <u>H</u> elp				
Data Protection Maintenance - Contac	ct Processing			×
- Information	-			
This window allows you to process	the list of contacts built in th	e preceding window.		
Combach	Customer	Nama	Datain Until	
Daniel Carter	ANDE001	Anderton Ltd	Retain Unui	Anonymise
Alex Neal	NEAL015	A Neal & Sons	31/12/2020	
Sarah Kelly	WATK005	Geo Watkins		<mark>,</mark>
Lillian Wabb	WATS010	Watsons Plc		
Bob Jones	WATS010	Watsons Plc		+
				_
				Ŧ
				×
Details				
Created 16/04/2018				
Salutation Dan	Positio	n Accounts Clerk		
Phone 01736 258965	Fax	01736 547145		
Mobile 07729987558	Email	dan penfold@kerridgecs	s.com	
07725507550	Lindi	adinpentola@kellidgees		
Anonymise	Anonymise All	Restore All	Deselect	< <u>B</u> ack
Data Protection	Change Settings	Share with 3rd Party	Print	

This window appears when the 'Next' button is pressed in the 'Data Protection Maintenance – Contact Selection' window.

- **Purpose** This window allows you to manage the data protection preferences for the contacts selected in the preceding window.
 - **Note** When used as intended these settings provide options that alongside procedures managed outside of Global 3000 allow a business using Global 3000 to comply with the General Data Protection Regulation (GDPR). The existence of this function does <u>NOT</u> imply that a business using Global 3000 is GDPR compliant.

The prompts are:

Contact	(Display only) The contact name.
Customer/Supplier	(Display only) The customer/supplier code.
Name	(Display only) The customer/supplier name.
Retain Until	(Display only) The date the contact is to be retained until.
Anonymise	(<i>Display only</i>) This is set when the contact has been marked for anonymization at the end of the current period.

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The buttons are:

Anonymise/Restore	Press this to toggle between the currently hi-lighted contact being marked for anonymization or not ('Restore'). Anonymization takes place when the current period is closed and removes the contacts name, telephone/fax/mobile numbers and email address.
Notes	If all contacts at the associated address (and the address is not marked as being one of the main addresses (invoice, payment statement or delivery) for the account) have been anonymised the address itself will also be anonymised.
	If you mark a contact for anonymization this overrides and removes any 'retain until date' settings the contact may have configured.
	Contacts that have been anonymised are physically deleted at year end.
Anonymise All	Press this to anonymise all the selected contacts (when the current period is closed). This removes the contacts name, telephone/fax/mobile numbers and email address.
Warning	Once anonymised by close period the contacts details cannot be restored.
Restore All	Press this to restore all of the selected contacts that are currently marked for anonymization at the end of the current period.
Data Protection	When this is pressed you can view and amend the data protection settings for the currently hi-lighted contact.
Change Settings	When this is pressed you can specify data protection settings (via a separate window) to apply to the all the selected contacts.
Share with 3 rd Party	When this is pressed all the selected contacts (that have given permission for their details to be shared) are marked as having been shared with a third party (you will be prompted to enter details that can be used to identify the third party).
Print	This produces a listing of the selected contacts full details. It can be used when an individual requests a copy of their personal data held within Global 3000.
Note	The contacts listing is only available in PDF format.
Deselect	Press this to deselect the currently hi-lighted contact.
<back< th=""><th>Returns to the contact selection window (retaining current selections).</th></back<>	Returns to the contact selection window (retaining current selections).

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System Parameters (Administration) – Data Protection Maintenance – Contact Settings Update

C Global-Dev-VM - P2 - System Parameters
<u>File Run Settings Options H</u> elp
Data Protection Maintenance - Contact Settings Update
Details
Mark contacts as received via a third party?
Mark contacts as NOT received via a third party?
Mark contacts as having 'opted in' to data retention for the
purposes outlined in the data retention policy?
Mark contacts as having 'opted out' of data retention after having previously 'opted in'?
Retain contact details until
Mark contacts as having given permission for their details to be shared with third parties?
Mark contacts as having rescinded permission for their details to be shared with third parties?
Mark contacts as having 'opted in' to receiving marketing material?
Mark contacts as having 'opted out' of receiving marketing material?
Mark contacts as made aware of the privacy notice?
Data Retention Policy Privacy Notice < Back Apply
Partition 2 Computer 1D 16:45:37 dcp LM52AC/D4 EI

This window appears when the 'Change Settings' button is pressed in the 'Data Protection Maintenance – Contact Processing' window.

- **Purpose** This window allows you to manage the data protection preferences for **all** contacts selected in the preceding window.
 - **Note** When used as intended these settings provide options that alongside procedures managed outside of Global 3000 allow a business using Global 3000 to comply with the General Data Protection Regulation (GDPR). The existence of this function does <u>NOT</u> imply that a business using Global 3000 is GDPR compliant.

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The prompts are:

Mark contacts as received via a third party?	Set this to mark all selected contacts as having been supplied by a third party.
Mark contacts as not received via a third party?	Set this to mark all selected contacts as not having been supplied by a third party.
Mark contacts as having 'opted in' to data retention for the purposes outlined in the data retention policy?	Set this to confirm that all selected contacts have agreed to their personal information being retained for the purposes outlined in the data retention policy.
Mark contacts as having 'opted out' of data retention after having originally 'opted in'?	Set this to confirm that although the selected contacts have previously agreed to 'opt in' to data retention, they have subsequently decided to 'opt out'.
Retain contact details until	Set this date to the date the selected contacts are to be retained until, this date is checked by close period (Debtors Ledger or Creditors Ledger) and if the start of the new period is later, the contact details are automatically anonymised.
Mark contacts as having given permission for details to be shared with third parties?	Set this to mark all selected contacts as having given permission for their details to be shared with third parties.
Mark contacts as having rescinded permission for details to be shared with third parties?	Set this to mark all selected contacts as having rescinded permission for their details to be shared with third parties.
Mark contacts as 'opted in' to receiving marketing material?	Set this to confirm that the selected contacts have agreed to receive marketing material.
Mark contacts as 'opted out' of receiving marketing material?	Set this to confirm that the selected contacts have not agreed to receive marketing material.
Mark contacts as made aware of privacy notice?	Set this to confirm that the contacts have been made aware of the details in the privacy notice. The privacy notice should be given/read to the contact at the time the contact details are recorded; if the contact has been received from a third party they should be made aware of the privacy notice within one month of the contact being created.
The buttons are:	
<back< th=""><th>Returns to the contact processing window (making no changes).</th></back<>	Returns to the contact processing window (making no changes).
Apply	Press this to update the data protection settings of all selected contacts with the selections made in this window.
Data Retention Policy	Press this to view the data retention policy. This is only available if a link to the data retention policy document has been configured in system parameters.
Privacy Notice	Press this to view the privacy notice. This is only available if a link to the privacy notice document has been configured in system parameters.

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Customer/Supplier Maintenance - Address Details

Global-Dev-VM	- P2 - Customer Details Company: A1	Period: 6/2005	-	-	
<u>File Run</u> Setting	s <u>O</u> ptions <u>H</u> elp				
Addresses for	Anderton Ltd				
Address Number	Addressed To	EDI Address/ Lookup Code	Invoice	Statement	Delivery
1 /	Anderton Ltd		V.	<u>/</u>	√ ±
2 /	Anderton Ltd				
- Address Detai	ils				
Address	Units 26 - 28	Tax country GI	B 🔹 Great Britair	ì	
	4th Avenue				
	Blue Bridge Industrial Estate				
	Colchester, Essex				
Postcode	C09 2SS				
<u>S</u> earch	<u>Contacts</u> <u>P</u> ostcode Ang	onymise	Amend	Apply	Close
Partition 2 Compu	ter 1D		09:16:40 dcp	DL410A/W4	DSP CAPS

Anonymise/Restore (*Not available for supplier, delivery or invoice addresses*) Press this to anonymise the currently hi-lighted address. Anonymization takes place when the current period is closed and removes the address name, address lines and postcode. The country code is retained (for tax purposes). You will be prompted to decide whether or not the contacts associated with the address are to be anonymised.

Note If an address is anonymised it may no longer appear on reprinted documents. If Global 3000 SOP/POP is in use the address details will be anonymised from completed sales/purchase orders when the current period is closed.

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Customer/Supplier Maintenance - Contact Details

Global-Dev-VM - F	2 - Customer Details	Company: A1 Per	riod: 6/2005	-	
<u>File Run Settings</u>	<u>O</u> ptions <u>H</u> elp				
Contact Details f	or 18 Chapel Hill				
Account					
Anderton Ltd				Address	1
Contact Name		Cont	tact Type		
Daniel Carter					x
					1
					<u> </u>
					¥
					<u> </u>
Details					
Position	Accounts Clerk		Contact method	Email	
Salutation	Dan		Document method	Print	-
Phone no	01736 258965				
Fax	01736 547145				
Mobile	07729987558				
Email	dan.penfold@kerridgecs	.com			
http://					
Search	Anonymise	<u>D</u> ata Protec	tion <u>Am</u> end	Apply	Close
Partition 2 Computer	r 1D		09:17:52 dcp	DL410A/W3	DSP CAPS

Anonymise/Restore	Press this to toggle between the contact being marked for anonymization or not ('Restore'). Anonymization takes place when the current period is closed and removes the contacts name, telephone/fax/mobile numbers and email address.
Notes	If all contacts at the associated address (and the address is not marked as being a supplier, delivery or invoice address) have been anonymised the address itself will also be anonymised.
	If you mark a contact for anonymization this overrides and removes any 'retain until date' settings the contact may have configured.
	Contacts that have been anonymised are physically deleted at year end.
Data Protection	When this is pressed you can view and amend the data protection settings for the currently hi-lighted contact.

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Data Protection Settings – Contacts

Contraction Contractic Contract	
<u>File Run Settings Options H</u> elp	
Data Protection	
Details	
Contact name Daniel Carter	
Date contact created 16/04/2018	
Have the contact details been received via a third party?	
This contact has confirmed that they wish to 'opt' in to data	
retention for the purposes outlined in the data retention policy?	
Date contact opted in to data retention policy	09/05/2018
These contact details are to be retained until a specific date?	
Retain contact details until	
This contact has decided to 'opt out' of data retention after	
having previously 'opted in'?	
Date contact opted out of data retention policy	
This contact has confirmed that they give permission for their details to be shared with third parties?	
This contact has confirmed that they wish to 'opt in' to receiving marketing material?	
This contact has been made aware of the privacy notice?	
Date contact made aware of privacy notice	09/05/2018
This contact's details have been shared with a third party?	
Date details last shared	
Data Retention Policy Privacy Notice	ОК
Partition 2 Computer 1D	16:49:17 dcp LM52AC/DP EDT

This window appears when you complete the amendment or creation of contact details.

- **Purpose** This window allows you to specify the data protection preferences made by the contact.
 - **Note** When used as intended these settings provide options that alongside procedures managed outside of Global 3000 allow a business using Global 3000 to comply with the General Data Protection Regulation (GDPR). The existence of these options do <u>NOT</u> imply that a business using Global 3000 is GDPR compliant.

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The prompts are:

Contact name	(Display only) The contact name.
Date contact created	The date the contact was created.
Note	For historical contacts the creation date will be set by the system to the earlier of the account creation date, the date the account was last amended or todays date.
Have the contact details been received via a third party?	Set this if the contact details were supplied by a third party. For example on a sales order which is to be delivered directly to a consumer rather than to the customers standard delivery address.
Note	When a Debtors Ledger or Creditors Ledger account is imported, any contact details supplied are treated as being received via a third party. Contact details on sales orders received via Global 3000 EDI are also treated as being received via a third party.
This contact has confirmed that they wish to 'opt in' to data retention for the purposes outlined in the data retention policy?	Set this to confirm that the contact has agreed to their personal information (name, contact numbers, email address etc.) being retained for the purposes outlined in the data retention policy. Once set, this cannot be amended.
Date contact opted in to data retention policy	(Display only) This is the date the contact opted in to the data retention policy.
These contact details are to be retained until a specific date?	Set this if the contacts details are only to be retained until a specific date.
Retain contact details until	(Only available if the contact details are retained until a specific date) Set this date to the date the contact details are to be retained until, this date is checked by close period (Debtors Ledger or Creditors Ledger) and if the start of the new period is later, the contact details are automatically anonymised.
This contact has decided to 'opt out' of data retention after having previously 'opted in'?	(Only available if the contact initially opted in to the data retention policy) Set this to confirm that although the contact had previously agreed to 'opt in' to data retention, they have subsequently decided to 'opt out'.
Date contact opted out of data retention policy	(Display only) This is the date the contact opted out of the data retention policy.
This contact has confirmed that they give permission for their details to be shared with third parties?	Set this to confirm that the contact has given permission for their details to be shared with third parties.
This contact has confirmed that they wish to 'opt in' to receiving marketing material?	Set this to confirm that the contact has agreed to receive marketing material.

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Note	If the contact does not 'opt in' to marketing materials then attachments are not sent to the contacts email address if it is used when documents (e.g. Debtors Ledger statements or Creditors Ledger remittance advices) are delivered via email.
This contact has been made aware of the privacy notice?	Set this to confirm that the contact has been made aware of the details in the privacy notice. The privacy notice should be given/read to the contact at the time the contact details are recorded; if the contact has been received from a third party they should be made aware of the privacy notice within one month of the contact being created.
Date contact made aware of privacy notice	(Display only) This is the date the contact was made aware of the privacy notice.
This contact's details have been shared with a third party?	Set this to confirm that these contact details have been shared with a third party.
Date contact details last shared	(Display only) This is the date the contact details were last shared with a third party.
The buttons are:	
Data Retention Policy	Press this to view the data retention policy. This is only available if a link to the data retention policy document has been configured in system parameters.
Privacy Notice	Press this to view the privacy notice. This is only available if a link to the privacy notice document has been configured in system parameters.

System Parameters – Email Attachments

【 Global-Dev-VM - P2 - SOP System Par	ameters			
<u>File Run Settings Options H</u> elp				
Invoice Options - Email Attachments	for Company A1 Standext Systems Ltd			×
Details				
This window enables you to speci	fy up to five files to be attached to each emailed invoice or			
credit note for the currently select	ted company. The filename for each attachment including			
its extension (if it has one) should	d be entered preceded by its full path.			
Invoices				
				Marketing
Invoice attachment	C:\Global\Documents\Terms_and_Conditions.docx		Browse	
Invoice attachment	C:\Global\Documents\Flash_Sale_Prices.docx		Browse	<u>✓</u>
Invoice attachment	C:\Global\Documents\May_Offers.docx		Browse	
Invoice attachment			Browse	
Invoice attachment			Browse	
Cradit Natas				
Credit Notes				Marketing
Credit note attachment	C:\Global\Documents\Terms_and_Conditions.docx		Browse	
Credit note attachment	C:\Global\Documents\May_Offers.docx		Browse	7
Credit note attachment	C:\Global\Documents\Flash_Sale_Prices.docx		Browse	7
Credit note attachment			Browse	
Credit note attachment			Browse	
				Close
Partition 2 Computer 1D		09:24:38 dcp P	M520J/EA	EDT CAPS

Marketing

When this is set (the default) the corresponding attachment document is considered as marketing material and as such is not attached to emails where the email address belongs to a contact that does not accept marketing material.

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Customer Maintenance

Global-Dev-VM - P2 <u>F</u> ile <u>R</u> un <u>S</u> ettings <u>O</u>	- Customer Details ptions <u>H</u> elp	Company	r: A1 Period: 6/20)5	No. of Concession, Name			
General Details								
Customer	Name			Po	stcode	EDI Account	:	
BLAK001	Blakelock Insur	ance Brokers		S	N19 2SS	BLAKELOC	K WIMBLEDON	
BROW001	Brownhouse of	Preston		PI	R5 6RP	BROWNLOW PRESTON		
BZZZZZZ	Bloggs Services	•		P	CDE 001			
CUPI001	C.U.P. Internation	C.U.P. International			5000		NATIONAL	
DAVI001	Davies & Brown			S	A7 5HJ	DAVIES BR	ROWN	
DESI010	Design Graphics	Design Graphics Ltd			R2 7RA	DESIGN G	RAPHICS LTD	
FUTU005	Future Design L	.td		HA5 12DL		FUTURE DE	ESIGN LTD	
GILE001	Gilera Cartoleria	Gilera Cartoleria			539	GILERA CA	GILERA CARTOLERA	
NEAL015	A Neal & Sons	A Neal & Sons			E14 6UU	NEAL (MAI	NEAL (MAIDSTONE)	
PEAK001	Peak (Ins & Inv	Peak (Ins & Investment) Agents			L22 7TH	PEAK (INS & INVESTS)		
PHAN025	Phang Statione	ry Company				PHANG (H	ONG KONG)	
PRIC010	Price & Partners	5		N	E4 6WE	PRICE PAR	TNERS	
General Details								
Туре	Normal		▼ Heat	ad office			-	
VAT Status	VAT Status Normal Company registration number (CRN)							
Balance method	Open Item	I	▼ Acc	count sta	atus	Ina	active 🔻	
Account currency	Account currency GBP • Sterling Date account opened 20/04/2018							
Search	Addresses	Contacts	Ed <u>i</u> detail	5	New	<u>F</u> ind	Delete	
Document	Letter	Notes	Actions		Amend	Apply	Close	
Registration	Attributes	C <u>o</u> mpanies	Quick Crea	te		· • • • • • • • • • • • • • • • • • • •		
Partition 2 Computer 1	D				09:54:29 d	cp DL410/W1	DSP NUM	

Account status This allows you to define the account's status. Select one of the following:

- Active. This is the default.
- **Inactive**. Accounts flagged as inactive are by default excluded from account searches, account enquiries, the customer list and the customer address list. All of these features provide the ability to include inactive accounts in their operation. If an inactive account is used during Debtor's Ledger transaction entry, you are offered the options of activating the account or abandoning the transaction. For security and data protection, bank details are removed from inactive accounts. This takes place when the current period is closed.
- **Suspended**. This does not prevent you from entering transactions for these customers directly into Debtors Ledger. However if you attempt to enter an order for a suspended customer in Sales Order Processing, you are warned that the customer is suspended and offered the option to enter a held order for the customer. This setting has the same effect as changing the customer's credit rating to one that is suspended; however it suspends the customer for all companies that they trade with.
- **Note** An account status of 'inactive' does not prevent the addition of Sales Orders however, such additions do not automatically re-activate the account.

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Supplier Maintenance

Global-Dev-VM - P2 - :	Supplier Maintenance Company: A1 Perioc	d: 5/2005	-		
General Details	1010 <u>T</u> elb				
Supplier	Name		Postcode	EDI Account	
MANC010	Manchester Electricity Board		M1 7AP	ELECTRICITYMANCHEST	
MIDL010	Midlands Electricity Board		NG7 8UY	ELECTRIC MIDLANDS	
MYER010	Myelars Ltd		BH12 OHU	MYELARS	
NZZZZZZ	Norfolk Paper Ltd		NF01 2DP	^	
OLIV005	Oliffe			OLIFFE ITALIA	
PEND001	Pendlebury Office Services		CW12 9AP	PENDLEBURYPAPER	
PHIL001	Phimet Industries		CR4 5ET	PHIMET(CROYDON)	
PHIM001	Clanman Estates Ltd		TW1 2HL	CLANMAN	
REXE005	Rexon (UK) Ltd		MK8 4AJ	REXON MILTON KEYNES	
RICO005	Ricon (UK) Ltd		G20 0SP	RICON	
SHIPMAN	Shipman Freight Ltd			SHIPMANFREIGHT	
STAE025	Stafford Office Services		IP2 4HB	STAFFORD	
General Details					
Priority	1 Priority 1			Paid by factor?	
Typo	ELEC x Electrical Suppliare			Internal references2	
Type Overhead percenta				Internal references:	
Overnead percentag	Je 0.00 %				
VAT Status	Normal	Account curr	rency	GBP Sterling	
Account status	Inactive 🔹	Company reg	gistration number (CRN)		
Account mode	Normal	Date accour	nt onened	20/04/2018	
Account mode		Customer and	ferrer	20/04/2010	
		Customer re	ererence		
Search	Addresses Contacts Edi o	details	Ne <u>w</u>	<u>Find</u> Delete	
Docu <u>m</u> ent	Letter Notes Ac	tions	Amen <u>d</u>	Apply Close	
Registration	Companies				
Partition 2 Computer 1D			09:57:04	dcp CL410/W1 DSP CAPS NUM	

Account status This allows you to define the account's status. Select one of the following:

- Active. This is the default.
- Inactive. Accounts flagged as inactive are by default excluded from account searches, account enquiries, the supplier list and the supplier address list. All of these features provide the ability to include inactive accounts in their operation. If an inactive account is used during Creditor's Ledger transaction entry, you are offered the options of activating the account or abandoning the transaction. For security and data protection, bank details are removed from inactive accounts. This takes place when the current period is closed.
- **Note** An account status of 'inactive' does not prevent the addition of Purchase Orders however, such additions do not automatically re-activate the account.

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