Managing Customer Data in Connect

This is a guide on how to manage customer's personal data within Connect. (Please note: any customers shown in the screenshots within this document are for documentation purposes and are not real customers or addresses).
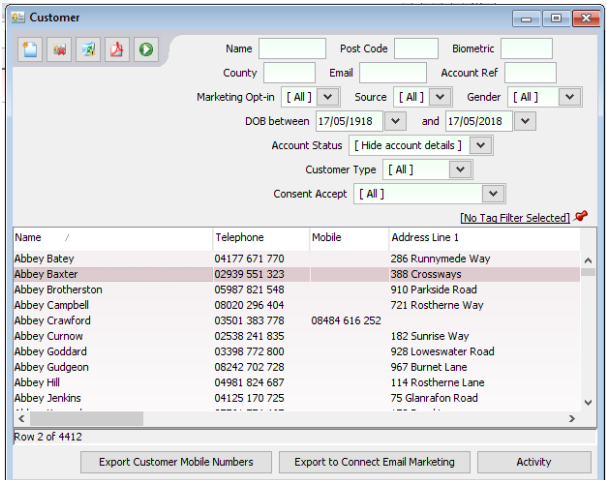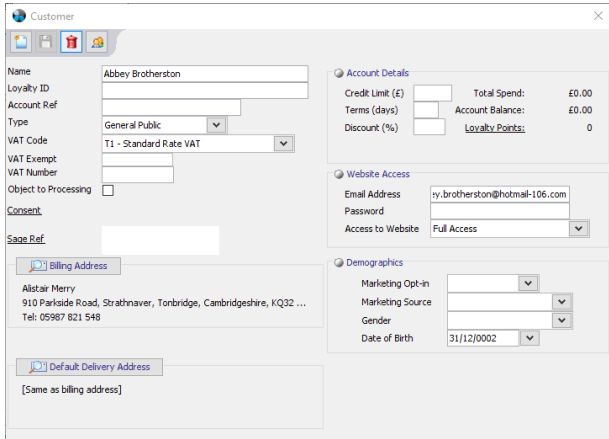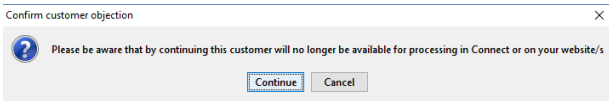
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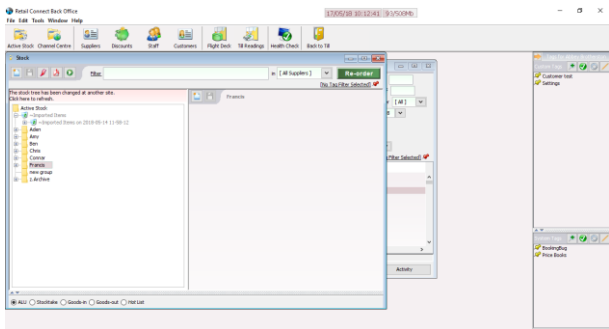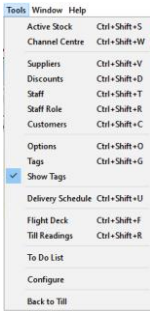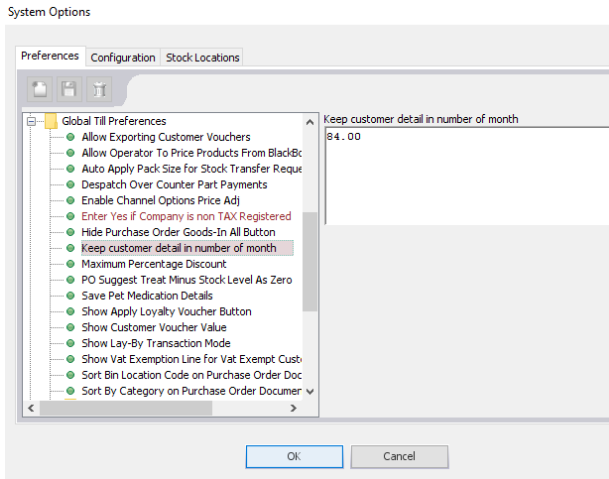Intelligent Retail Limited, Consort House, 42 Bone Lane, Newbury, RG14 5RD
Tel: 0845 680 0126   Support: 0845 680 0127   Fax: 0845 680 0128
Web: www.intelligentretail.co.uk   E-mail: enquiries@intelligentretail.co.uk
Registered Company: 5191397

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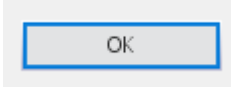
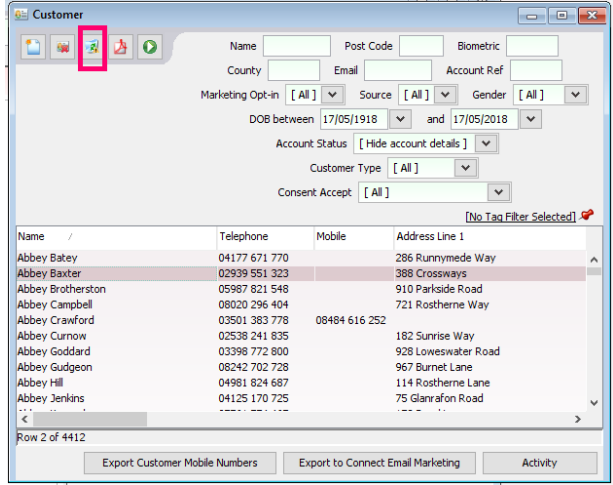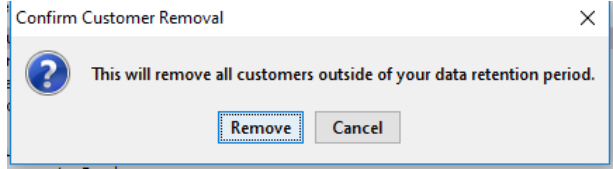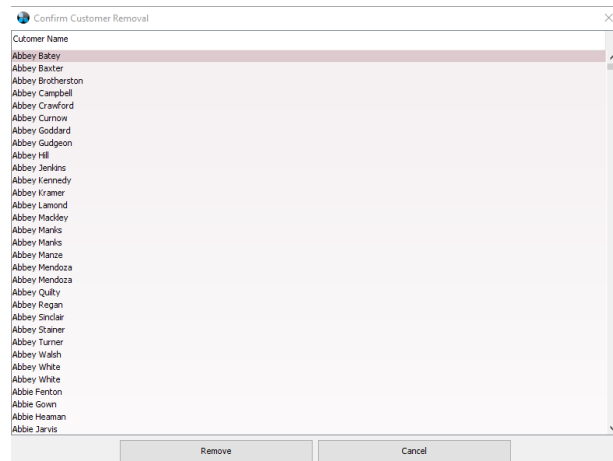| **Object to Processing**		
1	If a customer wishes to object to processing then either open the CLU on the till or open the customer's window in the back office.	
2	Double click the customer that would like to object to processing. You don't need to scroll down the list here you could search at the top of this window for name, email or anything relevant to that customer.	
3	This should bring up the customers details. Underneath the 'VAT Number' field, you should see a tick box titled 'Object to Processing'. Simply click this box.	
4	You will receive a confirmation message to say that the customer will no longer be available for processing in Connect or on an integrated IR website.	
5	Click the save icon at the top of the window (you should notice this is now illuminated) and click the cross in the top right hand corner to close the window.	

Result: This customer will no longer be able to login to an integrated IR website, and if the customer tries to re-register with the same email address on the website they won't be able to as they have objected from processing. The customer will also be excluded from any customer reports and the CLU. If a customer changes their mind about objecting to processing you would need re-create the customer.
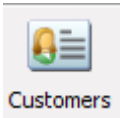
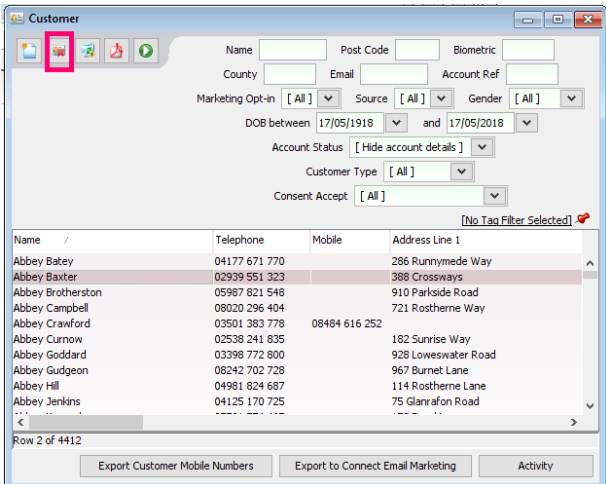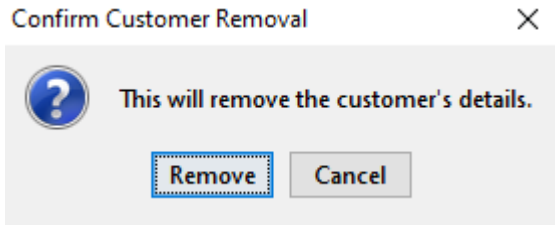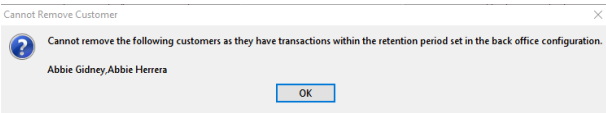**Archiving old accounts**

1	We can also archive old customer accounts/data after a set retention period. This can be changed to whichever period you wish. The first thing you will want to do is go to the back office and click 'Tools' up at the top of this screen.	
2	Click 'Configure'.	
3	Expand the folder titled 'Global Till Preferences', within this you should see 'Keep customer detail in number of months', click on this. On the right side of the window you will now see a number, the default value is 84 months (7 years). You can change this to the number of months you like to keep customer data for.	

4	Click 'OK' and you should be returned to the main back office screen again.	OK
5	Click 'Customers'.	Customers
6	In the customer's window at the top, you will now see a small recycle bin icon with a warning sign on it. If you hover over this, it will say 'Remove all historical customers'. Click this.	
7	This will bring up a confirmation page to confirm that you want to remove/archive all the customers outside of the retention period. Simply click 'Remove' if you want to proceed.	Confirm Customer Removal This will remove all customers outside of your data retention period. Remove Cancel
	This will bring up another confirmation page with a list of customers that will be affected. Again if you are happy to proceed simply click 'Remove'.	

Results: All the customers outside of your set retention period's data will be scrambled. They will no longer show in the CLU or customer reports. If you bring up a transaction for these customers then their details will also be scrambled on these.

Again, the customer will not be able to login on an integrated IR website. They will however, be able to re-register with the same email address should they wish to.
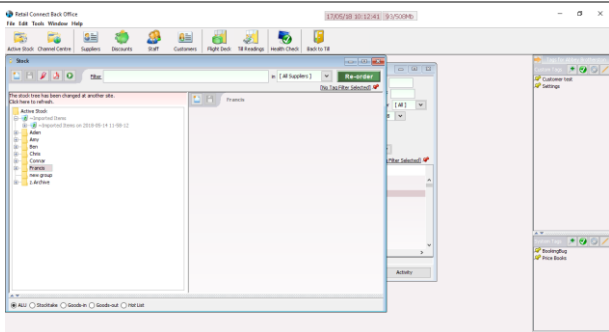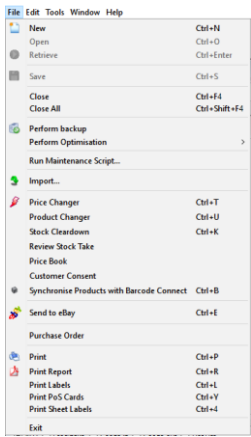
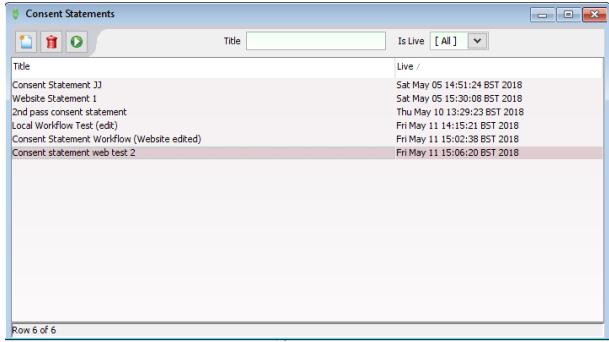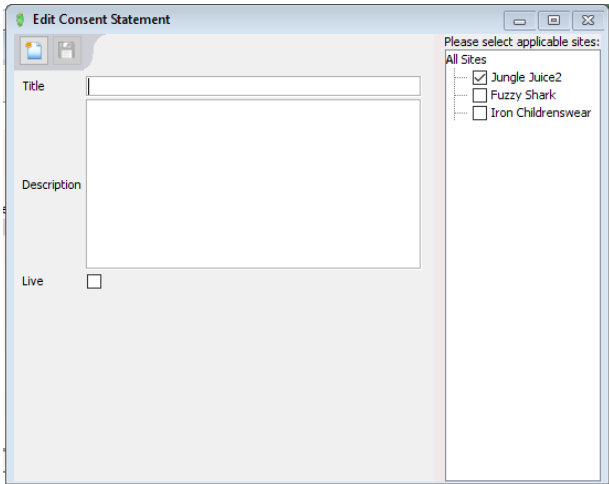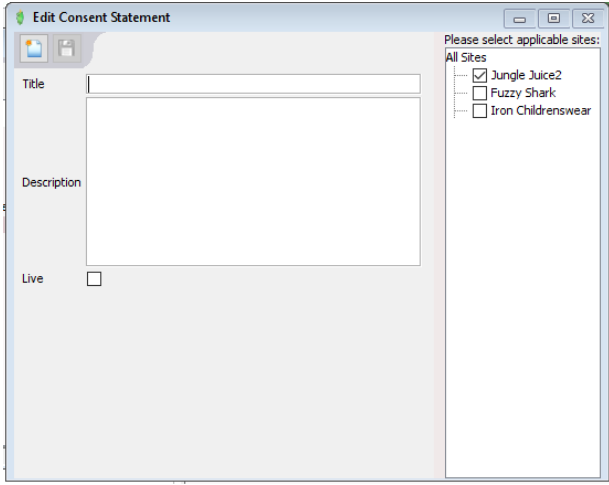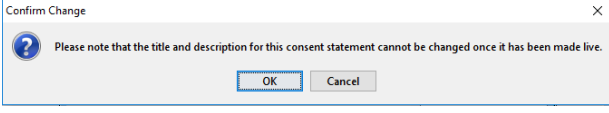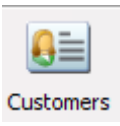|	**Removing Customer Data**	
1	If for any reason you need to remove a customer or multiple customer's personal data from Connect then you can do so by following these steps. Firstly go to the back office and click the 'Customers' button at the top.	
2	Simply highlight the customer(s) you wish to remove. If you hold ctrl and click the customers, this will allow you to highlight multiple rows. You can also use shift and click to highlight a range of customers as well. Then click the icon at the top that shows Customers with a red cross through it.	
3	A confirmation message will now come up. If you are happy to proceed, simply press 'Remove'.	
4	At this point you may also receive a message informing you that Connect is unable to remove certain customers if they have transactions within your retention period that you have set in the back office.	

Result: All the customers outside of the set retention period's data will be scrambled. They will no longer show in the CLU or customer reports. If you bring up a transaction for these customers then their details will also be scrambled.
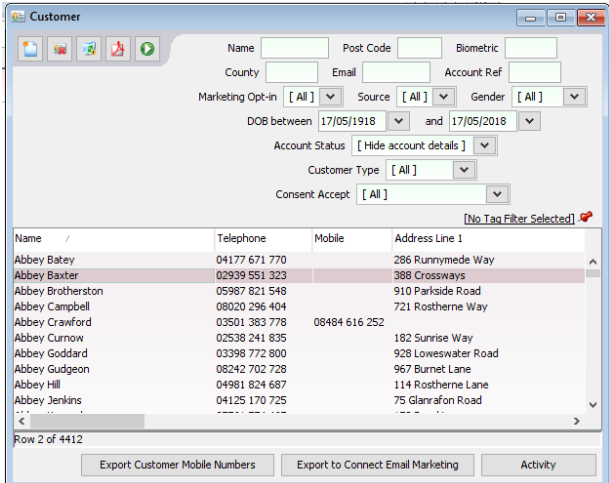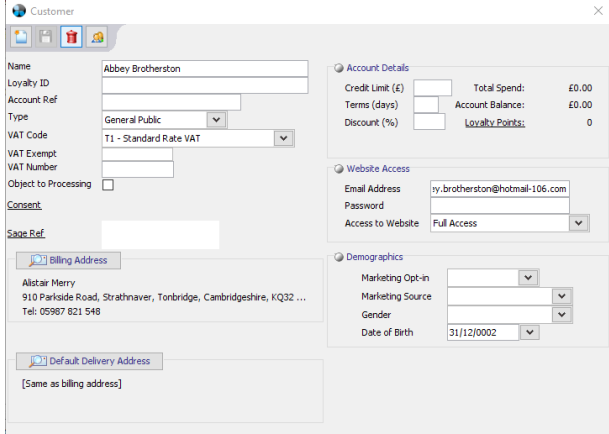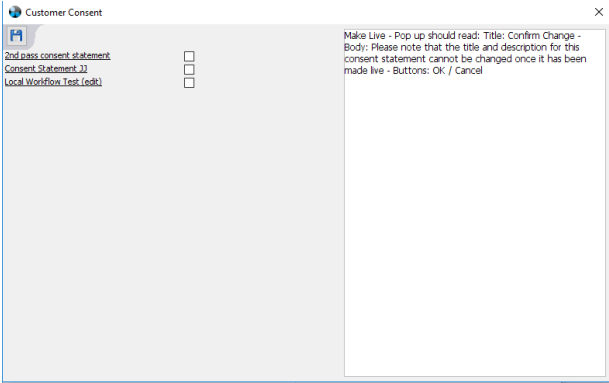
Again, the customer will not be able to login to an integrated IR website. Though they will be able to re-register with the same email address.
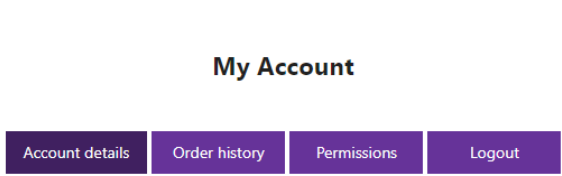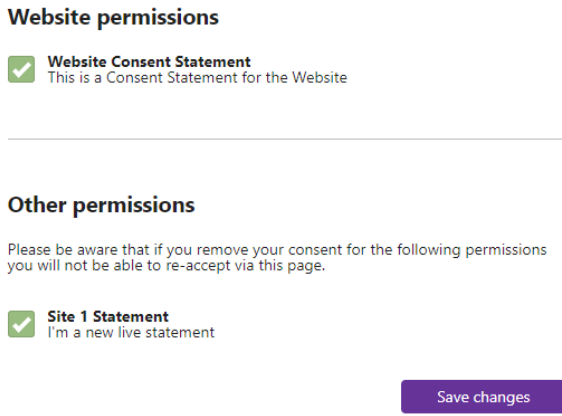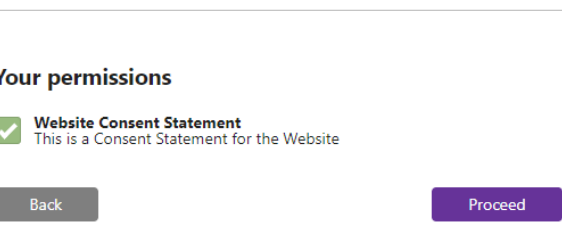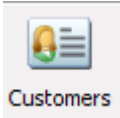
Tip: The difference between deleting customers and archiving customers is that archiving deletes all customers outside of your retention period where as deleting allows you to delete customers by selecting them.
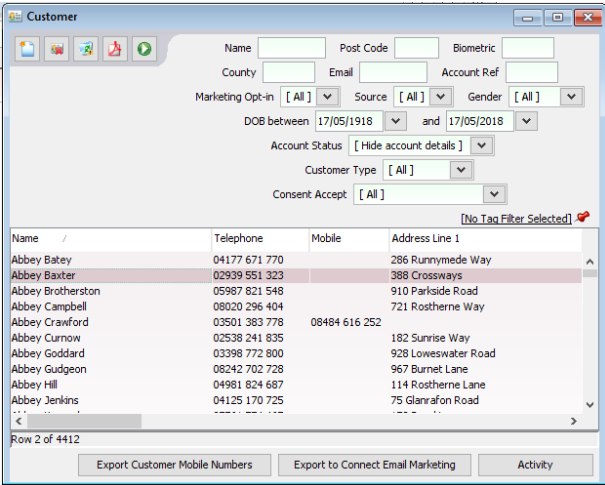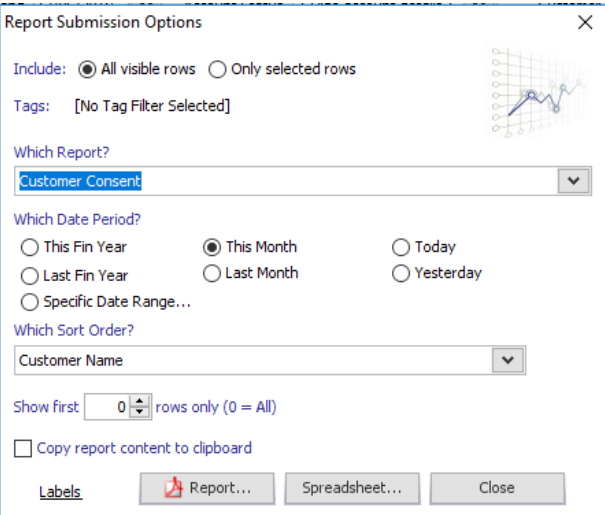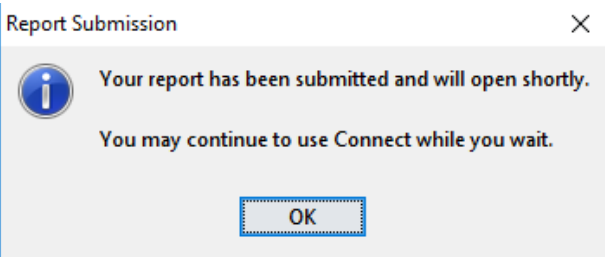
Consent Statements

1	To create consent statements for your stores or for your integrated IR website then you can do so by following these steps: Firstly, go to the back office and in the top navigation bar click 'File'.	
2	Then click 'Customer Consent'.	
3	To create a new consent statement, click the new icon at the top left of the 'Consent Statements' window. If you wish to remove a consent statement then you can click the bin icon next to the new icon (please note that you cannot delete a statement once it is set to live).	

4	After clicking new to create a new consent statement, you will see a few different areas. On the right hand side you will see all your sites including integrated IR websites. Simply tick any site you want to be able to use these consent statements. The title is the name of the statement, and the description will be what your statement consists of. You can of course, have multiple statements for a single site or even for different sites (website or physical store).	
5	When you are happy with the statement, click the 'Live' box (please note you can't change the title or description after ticking the statement as live, however you can still change the sites).	
6	Once you tick the 'Live' box, you will get another confirmation page. If you are ready to proceed, simply click 'OK'.	
7	To note which statement(s) a customer has agreed to, close the consent statement(s) window down and open up the 'Customers' tab again on the back office.	

8	Double click on whichever customer you wish to mark as consenting.	
9	Click the underlined 'Consent' button. This is below 'Object to Processing'.	
10	This will bring up the 'Customer Consent' window. To mark which statements the customer has agreed to, simply tick them. You will only see statements relevant to your site here (please note you can see the description of each statement by clicking them on the left).	
11	Click the save button at the top of the window.	

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12	On integrated IR websites, you will also see some changes for managing consent. You will find that once your website has been upgraded and logged in that under the account page there is now a 'Permissions' button, click this.	**My Account** Account details Order history Permissions Logout
13	This will show you all of the consent statements you have created for the website under the 'Website Permissions' header. The part in bold is the title of the statement and the part below this is the description. Customers can tick and untick this as they wish to update their consent preferences. If the customer has consented to any other consent statements in a store, these will show under 'Other Permissions' (please note the customer can untick these here but will not be able to re-tick them on the same page as these are in-store statements).	**Website permissions** ✅ **Website Consent Statement** This is a Consent Statement for the Website **Other permissions** Please be aware that if you remove your consent for the following permissions you will not be able to re-accept via this page. ✅ **Site 1 Statement** I'm a new live statement Save changes
14	At the checkout, you will also see at the bottom of the 'Secure Checkout' page another area where customers can consent to these statements whilst checking out. By default, these will be unticked (please note we can't change this to be automatically ticked).	**Your permissions** ✅ **Website Consent Statement** This is a Consent Statement for the Website Back Proceed
Filtering & reporting on consent preferences		
1	Go to the back office and click 'Customers'.	Customers

2	You will see at the top of the customer window multiple different filters. One of which is 'Consent Accept'. If you click the drop-down and select a statement, you can filter on this to see which customers have consented to that statement.	
3	If you click the PDF icon at the top of this window or go to 'File' and 'Print Report', it will open up the 'Report Submission Options' window.	
4	Select the 'Customer Consent' in the 'Which Report?' drop down. This will allow you to run a report on customer consent preferences.	
5	The report will show the 'Customer Name', 'Consent Title', 'Consent Given Date' and 'Consent Remove Date' headers and details.	**Customer Consent** 01/05/2018 00:00 to 31/05/2018 23:59 Ordered by Customer Name