



sellify – HOW TO

GDPR-compliant work with sellify



Guideline for the collection and storage of personal data in sellify according to the current basic data protection regulations (GDPR)



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1. Introduction

On May 25, 2018, the European General Data Protection Regulation came into force. The enhancements and new functionalities described below support you as a user in implementing the specifications with sellify in compliance with the regulations.

The implementation (sellify release 3.7) covers the following topics:

- Storage of the data origin, legal basis and purpose of collection incl. the option to store additional information as a remark.
- Storage of contacts who have received personal data (data recipients)
- Report 'GDPR personal information' with all relevant personal information
- Templates for declaration of consent, confirmation of deletion/ anonymization and request for deletion from third party data recipients
- Function for deletion of personal data
- Function for anonymization of persons
- Function for revocation of a person
- Determination of the expiration date, controlled by the legal basis
- Support of links and data maintenance via tagging (#Tags)
- Access to the new fields in table columns with search and filter option

All GDPR-relevant information about a person can be found on the person card or in the

The screenshot shows the 'DSGVO' (GDPR) tab for a contact. The contact details are: Frau Mariella Albasson, Portofam Beteiligungs- & Finanzdienstleistungen GmbH, Merowingerstraße 42, 50677 Köln (Deutschland). Below the details are fields for 'Datenherkunft', 'Rechtsgrundlage', 'Erhebungszweck', and 'Ablaufdatum', each with an 'eintragen' (enter) button. A table titled 'Dateneempfänger' is visible, with columns for 'Beziehungsart', 'Zu Kontakt', 'Bemerkung', 'Erfasst von', and 'Erfasst'. At the bottom, there are buttons for 'Person hinzufügen', 'Organisation hinzufügen', 'Entfernen', and 'Excel Export'. A status bar at the very bottom shows a lock icon, indicating that the data is not yet GDPR-compliant. The 'Speichern' (Save) and 'Abbrechen' (Cancel) buttons are also present.

Person dialog in the 'GDPR' tab. The lock icon in the status bar shows you that the personal data has not yet been documented in a GDPR-compliant manner.

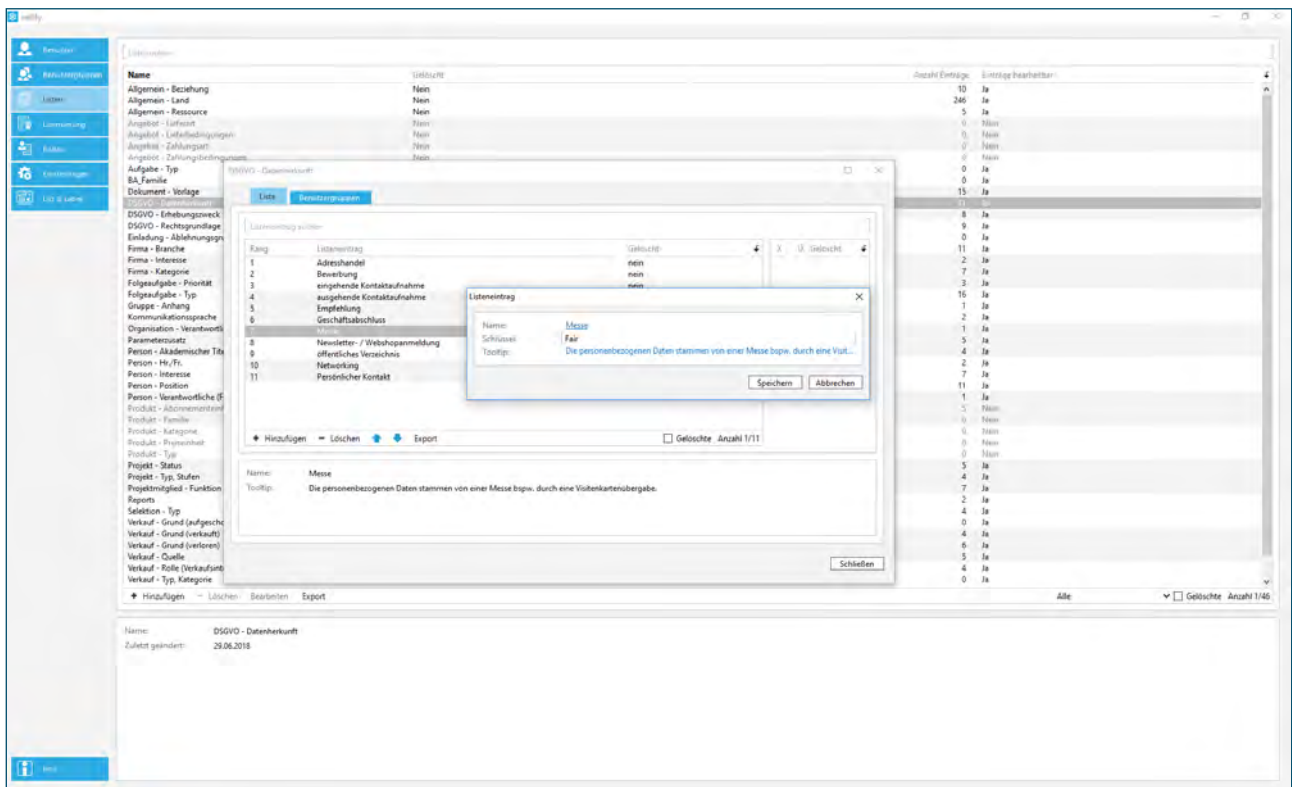


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2. Preparation

To document the origin of personal data records, the lists 'GDPR- Data origin', 'GSPR- Legal basis' and 'GDPR- Purpose of collection' are available in sellify//admin under 'List'.



Here you can enter the data origins and data collection purposes as well as legal bases commonly used in your organization. You can enter additional information in a comment field.

The entered list values will be available the next time you restart your sellify application.

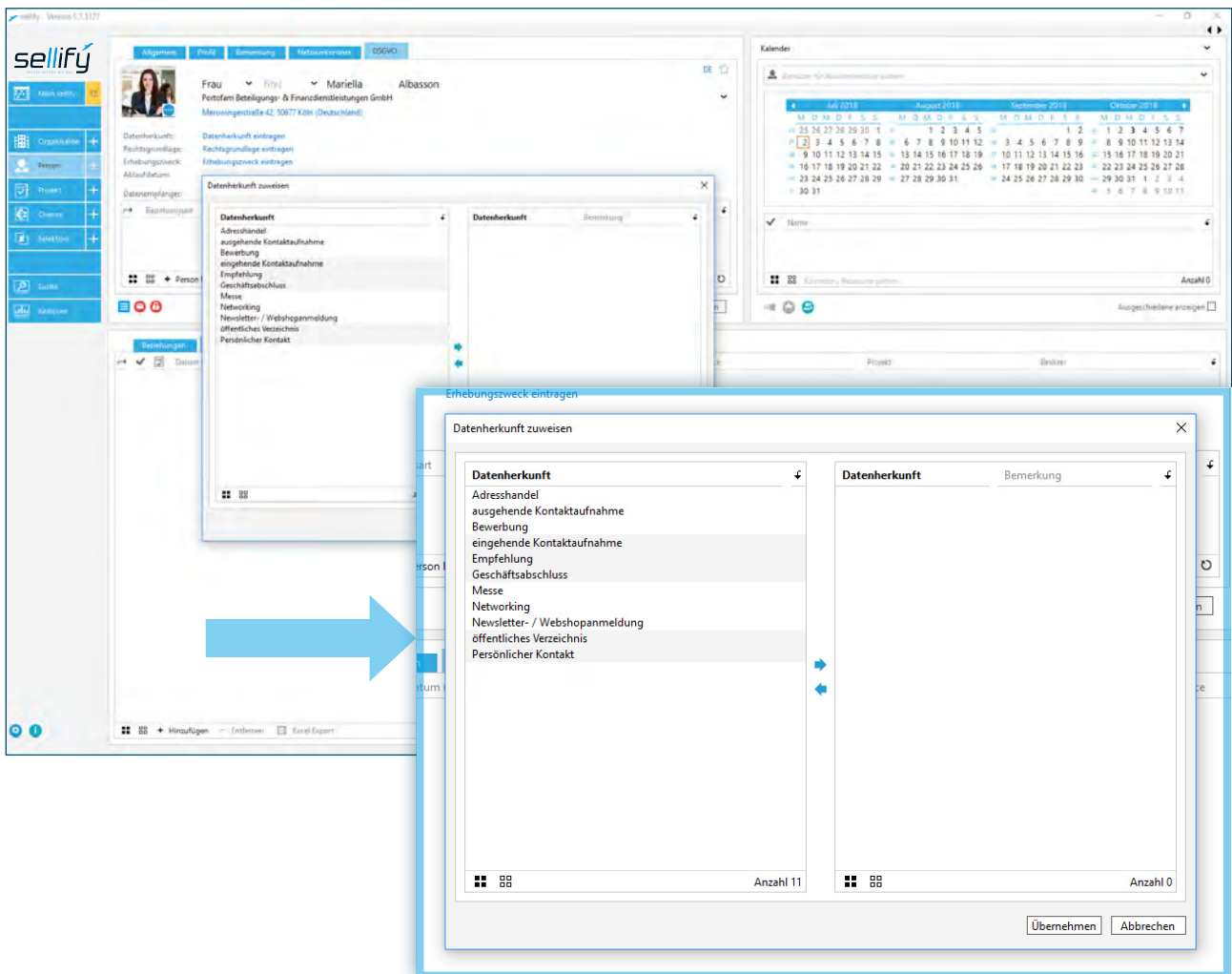


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3. Saving the data origin

To enter the data origin, click on the hyperlink 'Enter data origin' in the edit mode of your sellify application. In the opening assignment dialog, select the origins available on the left.



Double-click or use the right arrow to assign them to your selection. Marked origins in the right field can be deselected again via the arrow to the left.

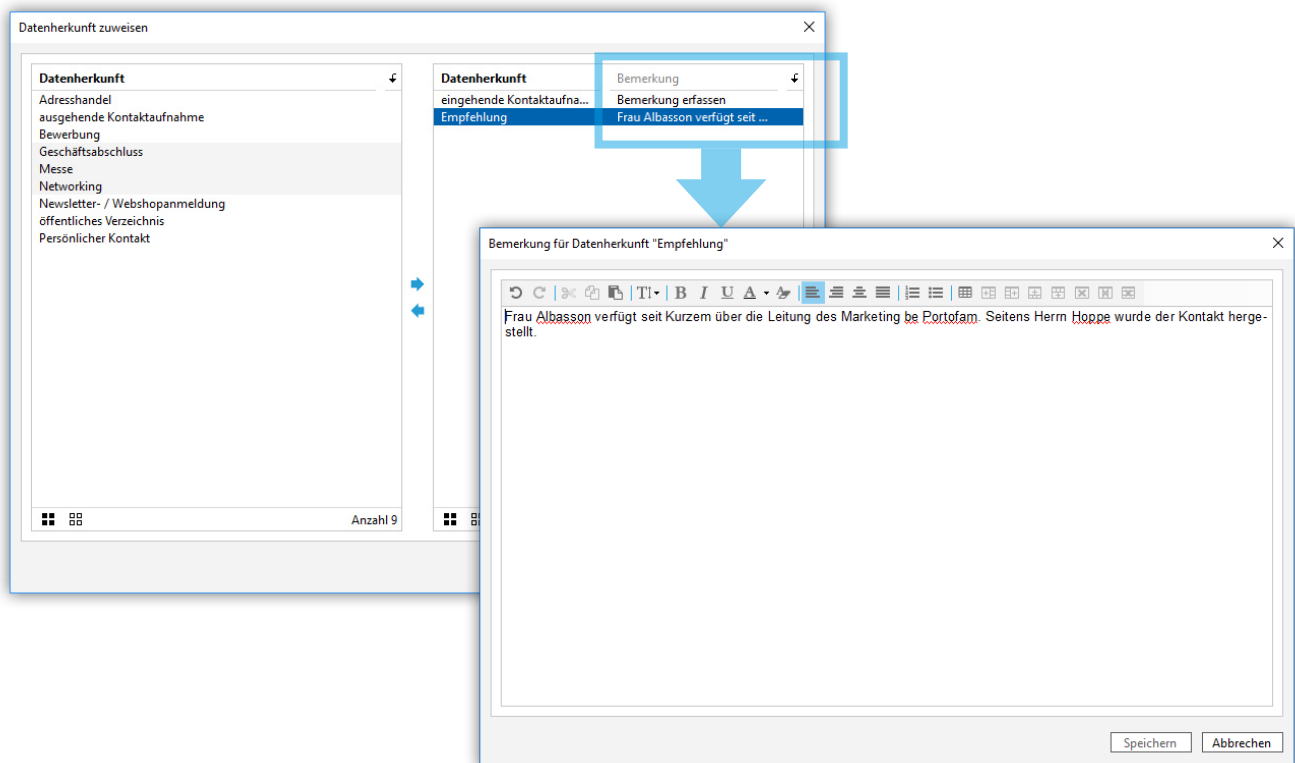


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The applied list entries on the right are also displayed directly in the person map in the background when you select them. However, they are not actually applied until you save the selection dialog.

For each assigned data origin, you can enter individual remarks for the person by clicking on the line entry 'Enter remark' in the Remark column.



When you have entered all the data origins that apply to the person, save your entries by clicking 'Apply'.

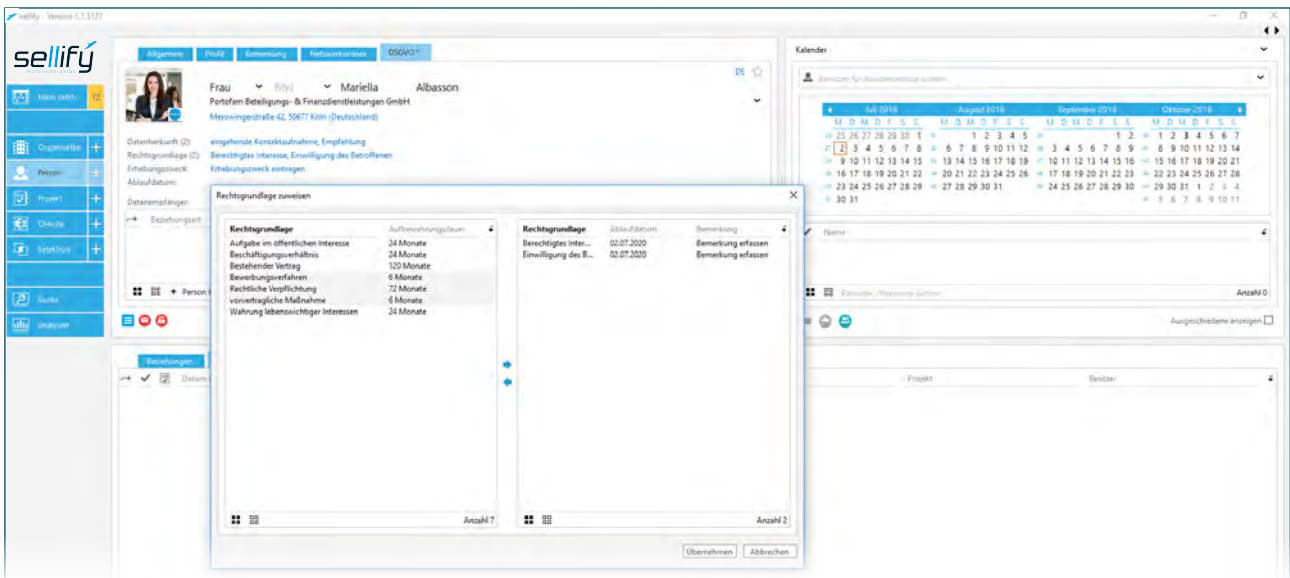
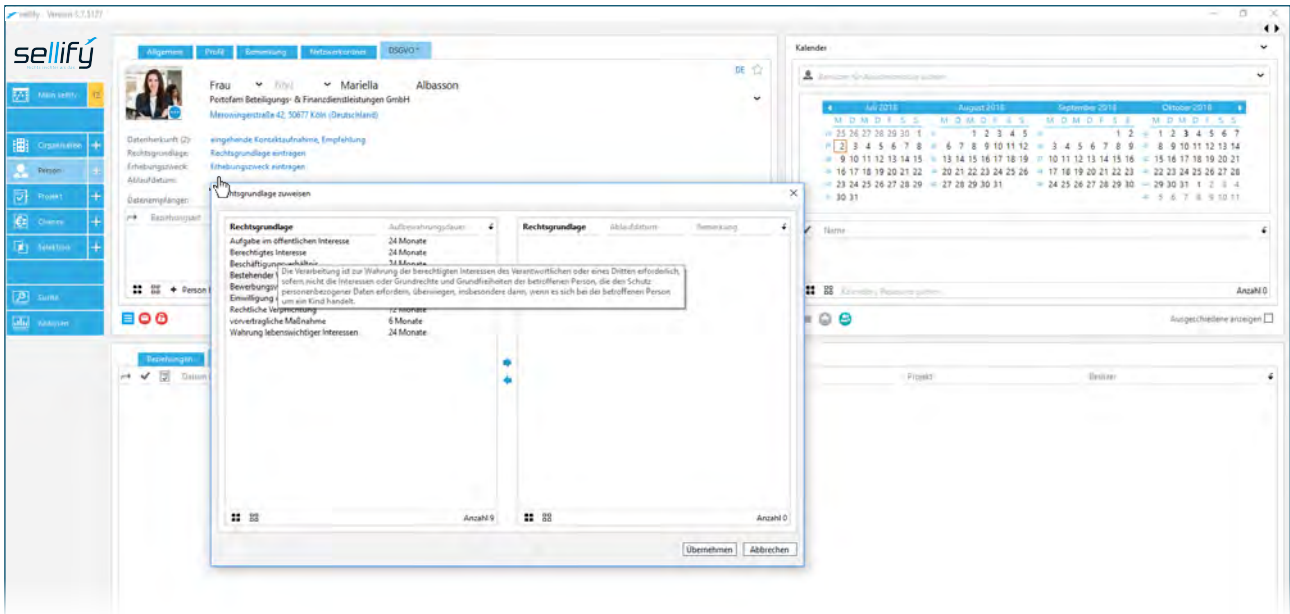


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4. Storage of the legal basis

In this section, you enter the legal basis(s) for storing personal data and proceed in the same way as in the 'Data origin' step.



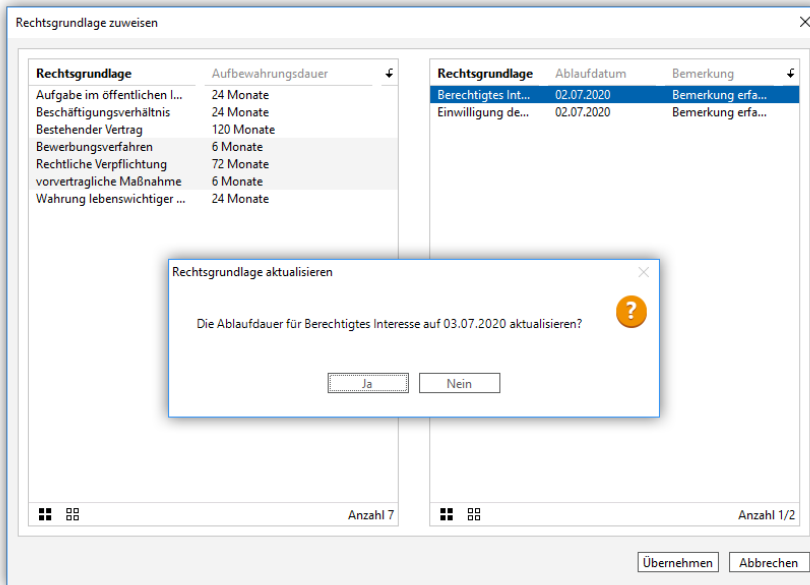
The individual defined legal bases are linked to a storage period in months. When a new entry is made, an expiration date for the respective legal basis is saved from the current date added to the stored retention period.



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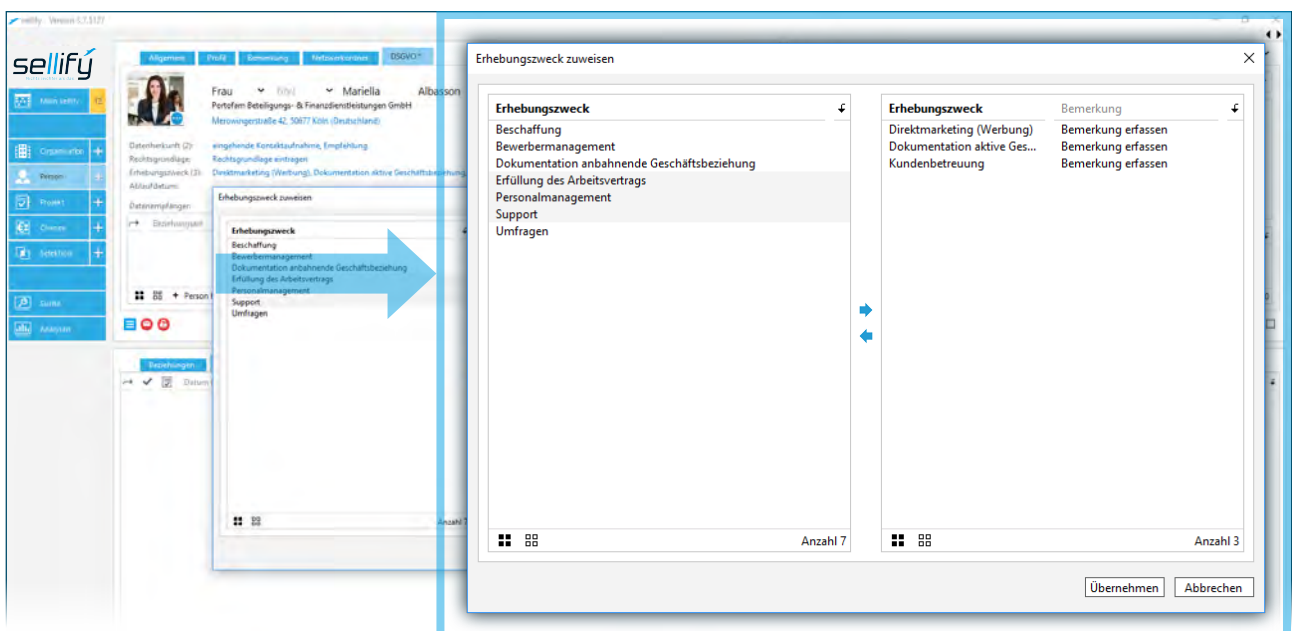
You can update the start time for the storage duration to 'today' in the dialog via the hyperlink in the 'Expiry date' column.



For the selected list values, a comment field is also available in each case, in which you can store further information on the respective legal basis.

5. storage of the purpose of collection

Here you store the purposes for which you process the data of a person. In the comments field, you can record further information on the respective purposes.



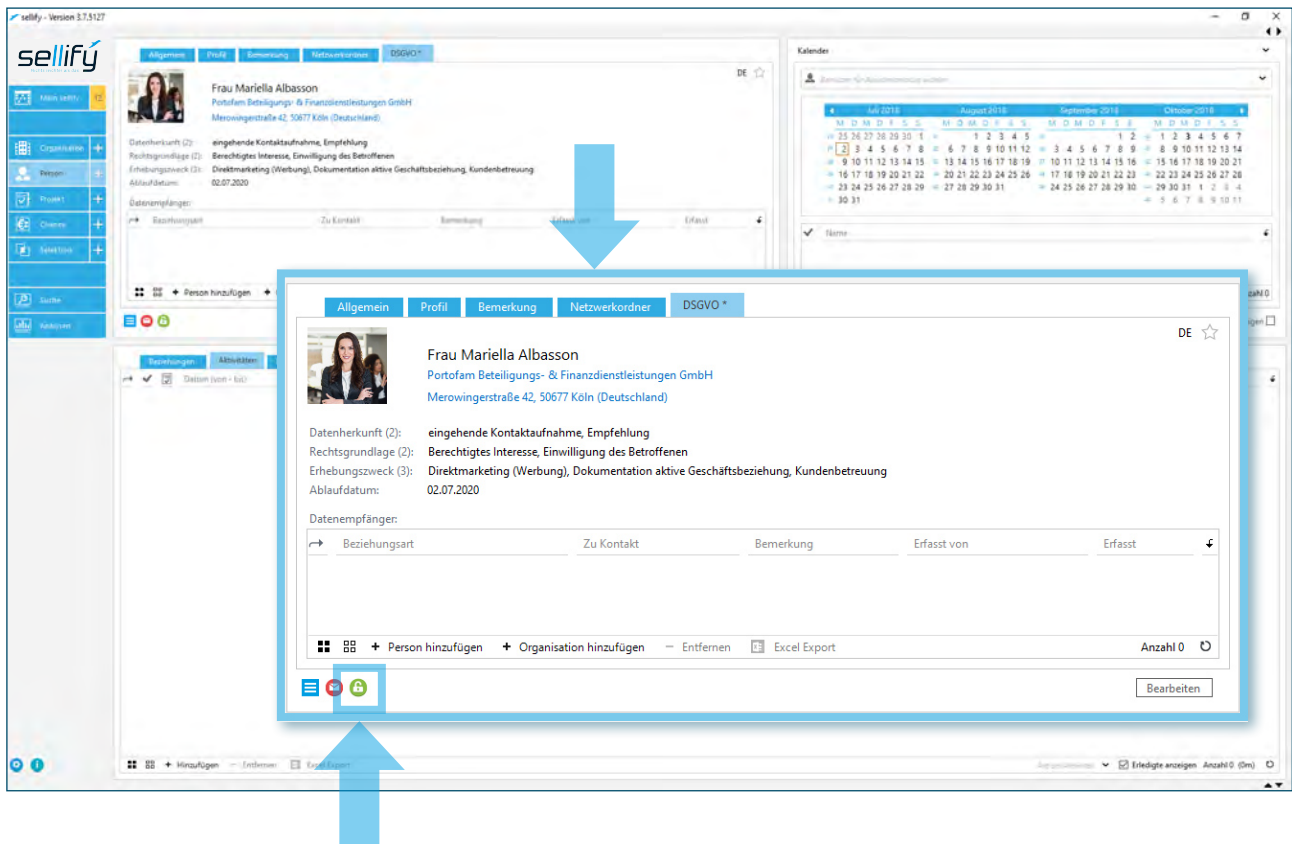


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6. Determination of the expiration date

The expiration date is determined automatically. If you have set at least one legal basis and one collection purpose, the highest expiration date of all legal bases is taken as the expiration date of the person. On this date, you must recheck the legality of the storage of the respective personal data and, if necessary, update it or instruct its deletion or anonymization.



If you have completed the steps 'Data origin', 'Legal basis' and 'Purpose of collection', you have entered the personal data in compliance with the GDPR. The lock icon in the status bar shows you this accordingly by changing color from red to green.

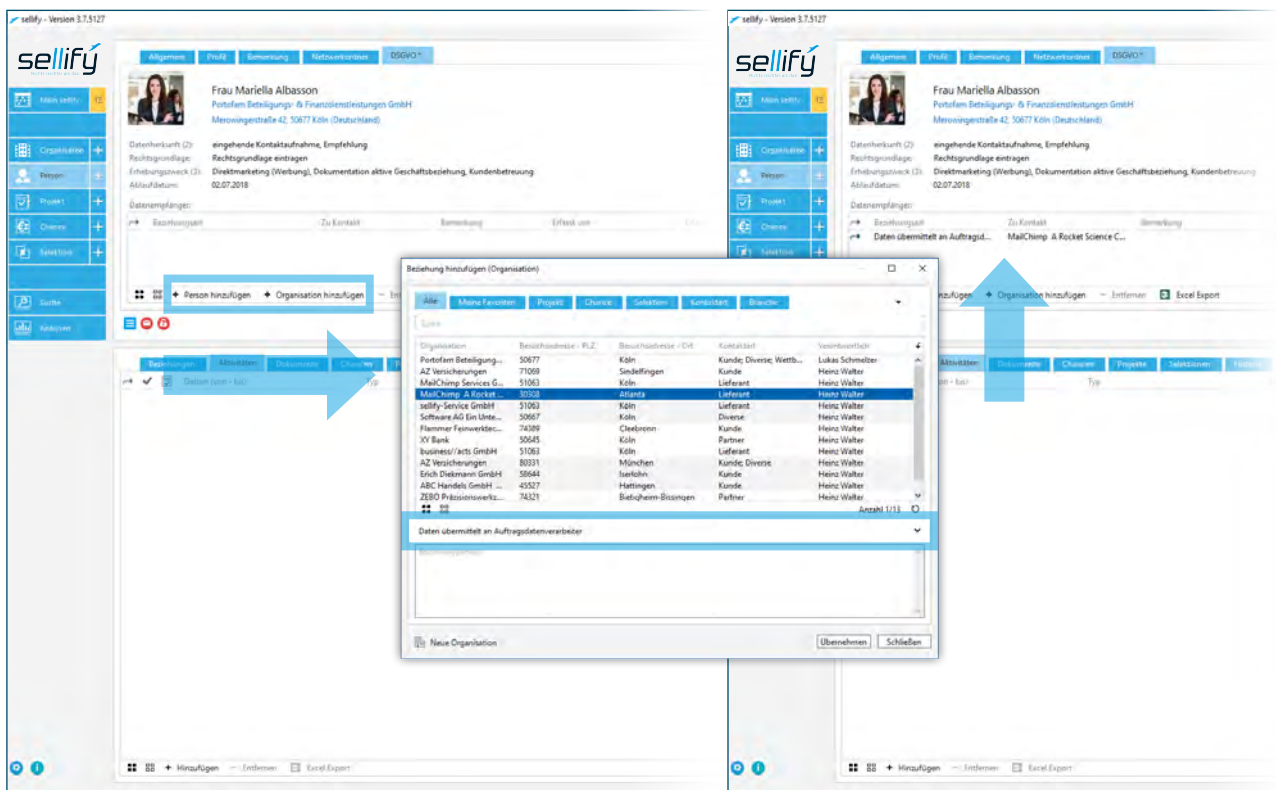


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7. Storage of data recipients

In case the personal data is to be passed on to third parties, you can store all data recipients in this area. Relationships are stored and listed in the general relationship list. The relationship types that can be used here must be marked as 'GDPR relevant' in sellify/admin.



In the dialog, you do this by selecting the person/organization that may receive the data on the person. Then it is mandatory that you assign one to each data recipient via the 'Function' dropdown. Without this specification, you will not be able to transfer the selected data set.



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8. Report 'GDPR personal information'

The GDPR personal information is available as a report and contains all stored personal data relating to the person. These are:

- Address data of the associated organization,
- communication data (telephone, e-mail, etc.),
- recorded profile information,
- all stored GDPR data as well as
- Remarks on the person

Personenauskunft

nach den Richtlinien der Datenschutz-Grundverordnung



Herr Johannes Fuchs
Portofam Beteiligungs- & Finanzdienstleistungen GmbH



Portofam Beteiligungs- & Finanzdienstleistungen GmbH
Merowingerstraße 42, 50677 Köln
☎ +49 89 4559797100 | 📠 +49 89 455979700
✉ service@portofam.de | 🌐 www.portofam.de

Personenbezogene Daten

Telefon geschäftlich: +89 89 4559797120
Telefon privat: +49 221 99 592 0
Mobilnummer: +49 171 90 210 77
Fax: +49 89 4559797120
Andere: -
E-Mail: johannes.fuchs@portofam.de
Social Media:
Privatadresse: Haselnussallee 12, 50668 Köln

Verantwortlich: Heinz Walther, sellify Service GmbH
Nummer: 1129021000
Funktion: Geschäftsführung
Position: Management
Abteilung: Sales, Management
Geburtstag: 22.06.1978
Ausgeschieden:
Mailsperre:

Profileigenschaften

Entscheider (Erfasst am : 12.03.2018)
Referenzgeber (Erfasst am: 12.03.2018)
Empfänger Weihnachtskarte (Erfasst am: 12.03.2018)

Empfänger Produktnews, halbjährlich (Erfasst am: 12.03.2018)
Empfänger Newsletter, 4x pro Jahr (Erfasst am: 12.03.2018)

Datenschutz-Grundverordnung

Datenherkunft: Visitenkarte erhalten
Rechtsgrundlage: Einwilligung des Betroffenen
Verarbeitungszwecke: Direktmarketing, Kundenbetreuung, Newsletter, Events

Empfänger: PROCALL CallCenter Services
Ablaufdatum: 22.08.2020

Stand: 06.04.2018 14:50 Uhr (Berichtsaufruf) Seite 1 von 2

The personal information can be stored via sellify//admin as a document attachment for e-mails in sellify and can thus be retrieved at any time.

This means that you can send it to the person concerned as an e-mail attachment at any time upon request, to obtain consent and when updating personal data, and also after deletion/ anonymization.



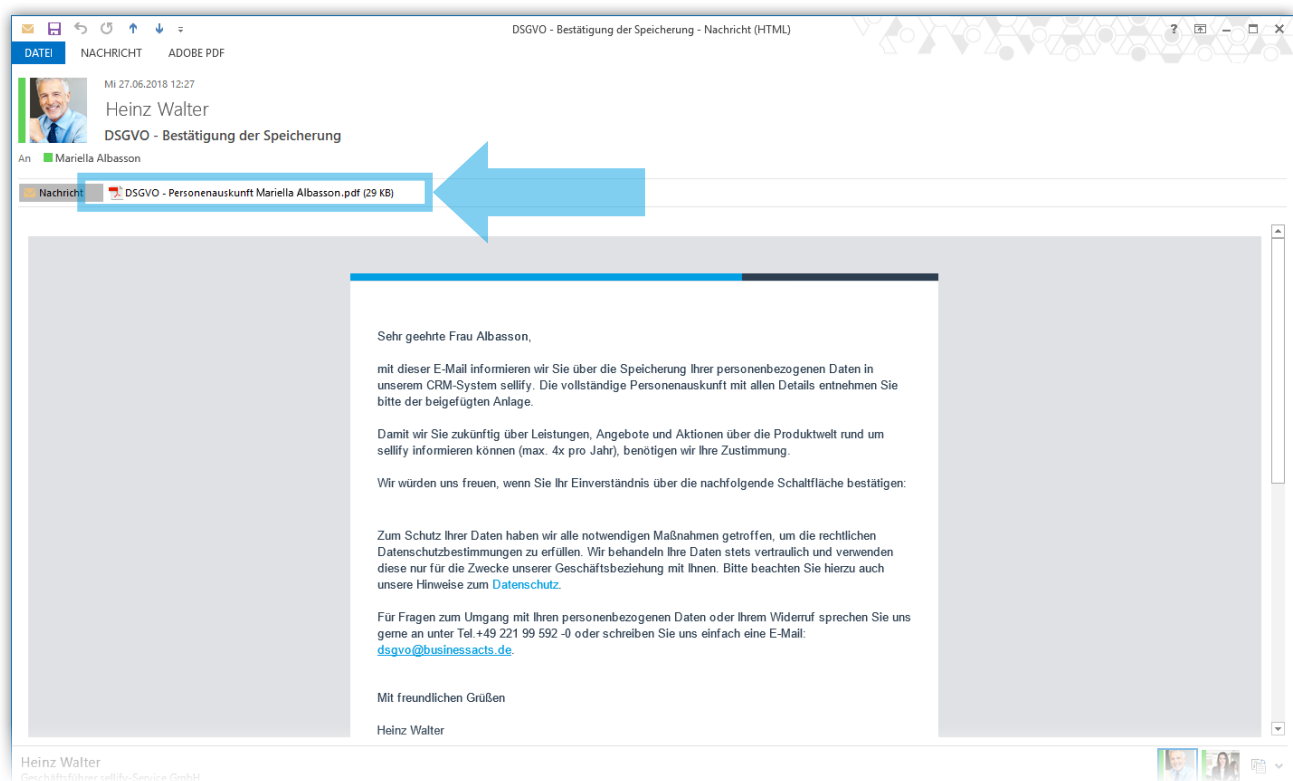
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9. GDPR Email Templates

For communication with individuals, you can define email templates for the following areas:

- Confirmation for the storage of personal data/consent of the data subject
- Deletion confirmation
- Anonymization confirmation
- E-mail to data recipient



Example: Email template: GDPR - Confirmation of the storage of personal data to the data subject.

Do you have questions about the update or about GDR-compliant work with sellify?

Our support team will be happy to assist you by phone at +49 221 99 592 0 or by mail at support@businessacts.de