

This user-guide covers features of TPTracker which help users comply with GDPR regulations when sending ‘Marketing communications’ or ‘Communications for legitimate business purposes’.

Summary

Fields are available in ‘Communication preferences’ for holding information on each person:

- (a) Their preferred method for receiving communications from you and whether there are any methods they specifically do not want you to use.
- (b) Whether they have consented to receive marketing communications and how/when they gave that consent, or withdrew it.

When you create a communication in TPTracker, you will be asked to select whether it is a ‘Marketing communication’ or not. If not, then TPTracker will treat it as a ‘Legitimate business communication’ as defined by the GDPR regulations.

If you define your communication as a ‘Marketing communication’, TPTracker will only allow you to select recipients from those who have positively given their consent.

In the case of ‘Marketing’ emails or text messages, these will then automatically include an ‘Unsubscribe’ option in each message which links to the ‘Consented to receive marketing communications’ field in the recipient’s personal details.

For ‘Non-marketing’ communications, TPTracker will allow you to select recipients, regardless of whether they have positively given their consent or not. In this case emails or text messages will not include an ‘Unsubscribe’ option.

1. Consent to receive marketing communications

Go to 'Profiles > People > View > Profile > Contact preferences'

Note that these fields may be populated automatically from your housing management database, in which case they would be greyed out and cannot be edited in TPTracker.

The fields are also linked to the 'Unsubscribe' option included in 'Marketing' Emails and SMS messages sent from TPTracker, and will be automatically updated if the recipient clicks this option.

1.1. Default - Consent not given

The screenshot shows the 'Contact preferences' section for Mr Alec Lopez. The 'Consent given to receive marketing communications' checkbox is unchecked. The 'How given/withdrawn' field is set to 'Consent not given by default' and the 'Date given/withdrawn' field is set to '06/09/2018'. A red box highlights these three fields. A 'Save Changes' button is visible at the bottom right.

If someone has neither given, nor withdrawn their consent to receive marketing communications, then TPTracker will treat them as not having given their consent.

On screen:

The 'Consent given to receive marketing communications' field will be unticked.

The 'How given/withdrawn' field will show 'Consent not given by default'.

The 'Date given/withdrawn' field will show today's date.

Where this data is included in any reports or Excel downloads from TPTracker:

The 'Consent given to receive marketing communications' field will show 'Not consented'.

The 'How given/withdrawn' field will be blank.

The 'Date given/withdrawn' field will be blank.

1.2. Consent given

Mr Aaron Smith, 117 Meadows Road, Happy Place, WS7 3RZ

Personal details Alternative contact Profile Activities Communications Groups Support Documents History

Diversity Economic status Involvement preferences Contact preferences Membership

Survey Preferences

Preferred Survey Method:

No email surveys

Communication Preferences

Preferred Communication Method: Not specified

No other communications by post

No other communications by text

No other communications by phone

No other communications by email

Consent given to receive marketing communications

How given/withdrawn: Response to email sent

Date given/withdrawn: 05/07/2018

Save Changes

If someone has given their consent to receive marketing communications, then these fields can be edited to record this.

On screen:

The 'Consent given to receive marketing communications' field can be ticked.

The 'How given/withdrawn' field will show whatever was previously entered and should now be over-written to record how they gave their consent.

The 'Date given/withdrawn' field will show today's date or whatever was previously recorded, but should now be edited to show the date they gave their consent.

Click the green 'Save Changes' button to amend the record.

Where this data is included in any reports or Excel downloads from TPTracker:

The 'Consent given to receive marketing communications' field will show 'Consented'.

The 'How given/withdrawn' field will show the text you entered.

The 'Date given/withdrawn' field will show the date you entered.

1.3. Consent withdrawn

Mr Aaron Smith, 117 Meadows Road, Happy Place, WS7 3RZ

Personal details Alternative contact Profile Activities Communications Groups Support Documents History

Diversity Economic status Involvement preferences **Contact preferences** Membership

Survey Preferences

Preferred Survey Method:

No email surveys

Communication Preferences

Preferred Communication Method: Not specified

No other communications by post

No other communications by text

No other communications by phone

No other communications by email

Consent given to receive marketing communications

How given/withdrawn: Informed by phone

Date given/withdrawn: 06/09/2018

Save Changes

If someone withdraws their consent to receive marketing communications, whether they had previously given their consent or not, then these fields can be edited to record this.

On screen:

The 'Consent given to receive marketing communications' field can be unticked (if previously ticked) or left unticked (if previously showing default settings).

The 'How given/withdrawn' field can be over-written to record how they withdrew their consent.

The 'Date given/withdrawn' field can be edited to show the date they withdrew their consent.

Click the green 'Save Changes' button to amend the record.

Where this data is included in any reports or Excel downloads from TPTracker:

The 'Consent given to receive marketing communications' field will show 'Not consented'.

The 'How given/withdrawn' field will show the text you entered.

The 'Date given/withdrawn' field will show the date you entered.

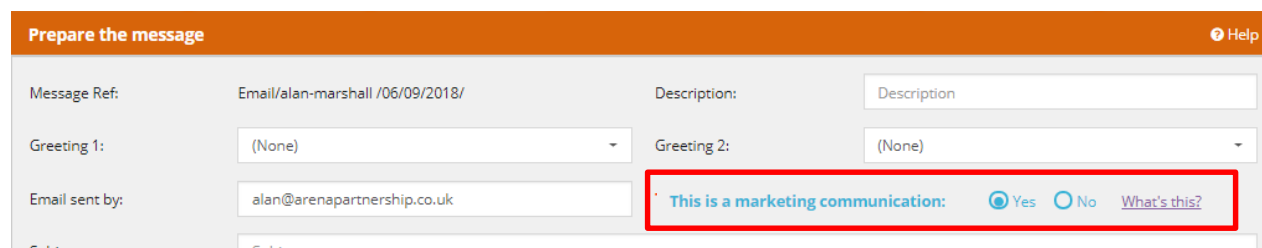
If someone clicks the 'Unsubscribe' link in a 'Marketing' Email or SMS message sent from TPTracker, then these fields will be automatically updated to show 'Consent withdrawn'.

In this case, the 'How given/withdrawn' field will show the communication reference of the message to which they unsubscribed.

2. Sending communications from TPTracker

2.1. Emails

Go to 'Communications > Email'



Prepare the message Help

Message Ref: Email/alan-marshall /06/09/2018/ Description: Description

Greeting 1: (None) Greeting 2: (None)

Email sent by: alan@arenapartnership.co.uk **This is a marketing communication:** Yes No [What's this?](#)

Subject: Subject

When creating an email through TPTracker it will by default be classified as 'This is a marketing communication'.

This will mean TPTracker prevents selection of people who have not consented to receive such communications and that an 'Unsubscribe' option will be automatically included in the email communication.

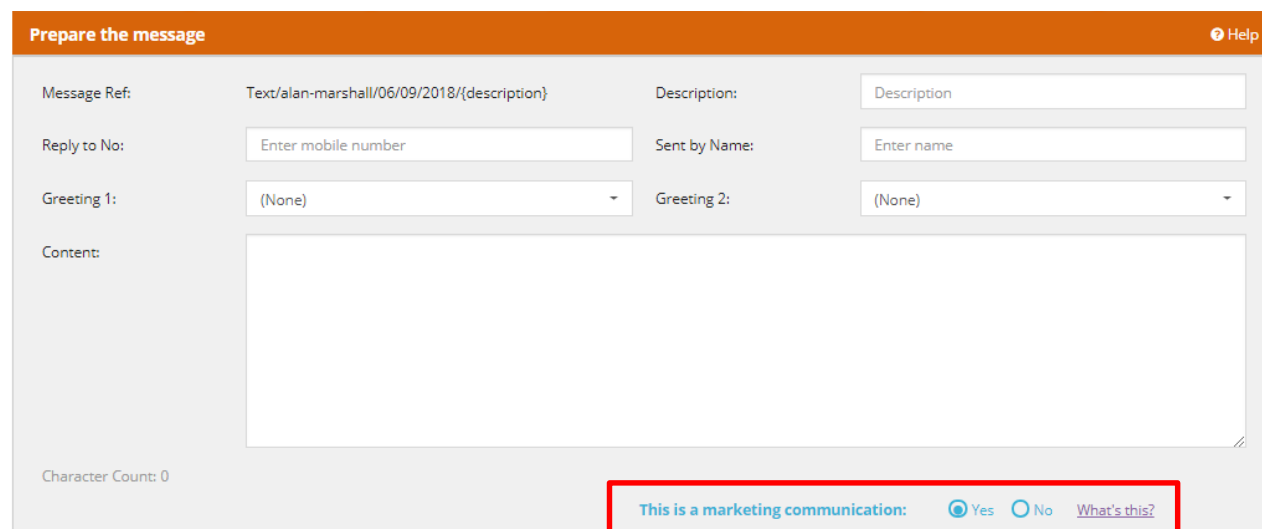
If you change this default setting by unticking 'This is a marketing communication', then the communication created will be treated as for your 'Legitimate business interests'.

Nobody will then be filtered out on the basis of whether they have given, not given or withdrawn their consent to receive marketing communications, but other communication preference filters will still apply.

An 'Unsubscribe' facility will not be included in the communication.

2.2. Text messages

Go to 'Communications > Text/SMS'



Prepare the message Help

Message Ref: Text/alan-marshall/06/09/2018/{description} Description: Description

Reply to No: Enter mobile number Sent by Name: Enter name

Greeting 1: (None) Greeting 2: (None)

Content:

Character Count: 0 **This is a marketing communication:** Yes No [What's this?](#)

When creating a Text/SMS message through TPTracker it will by default be classified as 'This is a marketing communication'.

This will mean TPTracker prevents selection of people who have not consented to receive such communications and that an 'Unsubscribe' option will be automatically included in the SMS communication.

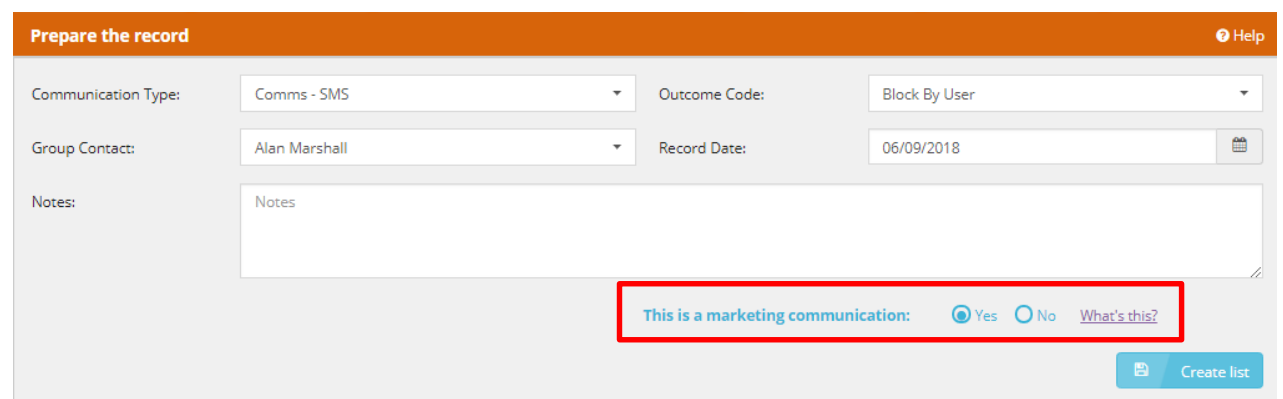
If you change this default setting by unticking 'This is a marketing communication', then the communication created will be treated as for your 'Legitimate business interests'.

Nobody will then be filtered out on the basis of whether they have given, not given or withdrawn their consent to receive marketing communications, but other communication preference filters will still apply.

An 'Unsubscribe' facility will not be included in the communication.

2.3. Letters

Go to 'Communications > Mailing'



The screenshot shows the 'Prepare the record' form in TPTracker. The form has an orange header with 'Prepare the record' and a 'Help' icon. Below the header, there are several input fields: 'Communication Type' (Comms - SMS), 'Outcome Code' (Block By User), 'Group Contact' (Alan Marshall), and 'Record Date' (06/09/2018). There is also a 'Notes' field. At the bottom, there is a section for 'This is a marketing communication:' with a 'Yes' radio button selected, a 'No' radio button, and a 'What's this?' link. A 'Create list' button is located at the bottom right.

When creating a postal communication through TPTracker it will by default be classified as 'This is a marketing communication'.

This will mean TPTracker prevents selection of people who have not consented to receive such communications.

If you change this default setting by unticking 'This is a marketing communication', then the communication created will be treated as for your 'Legitimate business interests'.

Nobody will then be filtered out on the basis of whether they have given, not given or withdrawn their consent to receive marketing communications, but other communication preference filters will still apply.

2.4. Including 'Unsubscribe' in communications

TPTracker will automatically include an 'Unsubscribe' option in 'Marketing' emails and texts sent from TPTracker.

Clicking 'Unsubscribe' in an email or SMS message will send a signal back to TPTracker which will then automatically:

Untick the 'Consented to receive marketing communications' field for that person and record the date and communication reference;

- Send an email alert with the person's personal details to a nominated email address, plus up to two cc email addresses. These email addresses can be set up using the screen below:

The image shows two screenshots of a web application interface. The top screenshot displays a navigation menu on the left with 'Admin' expanded to show 'Database', 'Security', and 'Arena'. The 'Database' option is highlighted with a red box. The main content area shows sections for 'Tenants', 'Households', 'TP Update', and 'Marketing Consent'. The 'Marketing Consent' section has a link '> Unsubscribe Alert Contacts' highlighted with a red box. A red arrow points from this link to the bottom screenshot. The bottom screenshot shows the 'Unsubscribe Alert Contacts' form with three input fields for 'Main E-mail', 'CC person 1', and 'CC person 2'. A 'Save' button with a checkmark icon is highlighted with a red box, along with a 'Reset' button.

2.5. Including links to 'Privacy policy' and/or 'Contact us' in communications

Go to 'Communications > Setup > Message defaults'.

Hyperlinked text can be included in the body of an email or text message, and also in the signatures or footers of an email by preparing the text, including the hyperlinks, in 'Word' and copying/pasting it into the 'Message defaults' screen as required.

This facility can be used to add links to your organisation's 'Privacy policy' or 'Contact us' pages in your website, if you wish.



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