

CFP Software Ltd

CFPwinMan^{sdb}

Version 4.7.1.3

Any changes since the initial release of version 4.7
will be available at the foot of this document.

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Introduction

CFPwinMan Version 4.7.1.3 onwards now offers:

- Anonymisation for contact records.
- Consent management.
- Personal Information Request fulfilment.
- Security improvements.

Improvements in CFPwinMan version 4.7.1.3

Anonymisation

CFPwinMan users can now anonymise information records, both individually and in bulk.

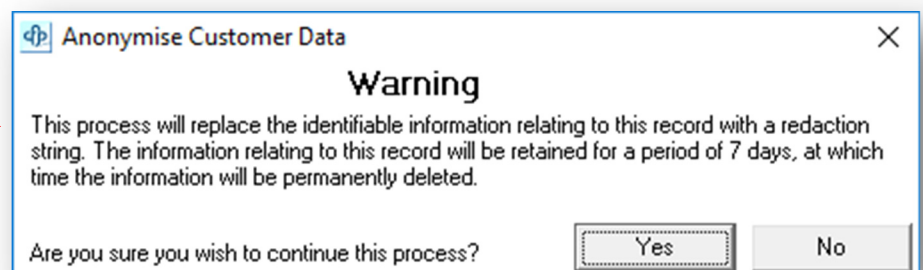
This applies to **Landlords, Applicants/Tenants, Contractors** and **Guarantors**.

- By default records cannot be anonymised if any accounts exist within the past 7 years. This can be overridden by users with access to **User Defaults**.
- Users are not given permission to anonymise at upgrade. To grant any user access to the functionality you will need to provide it in **Passwords**.
- Landlords and Contractors need to be archived before they can be anonymised. Applicants/Tenants can be archived or expired. Simply change their **Status**. Guarantors use the Applicant/Tenant status.

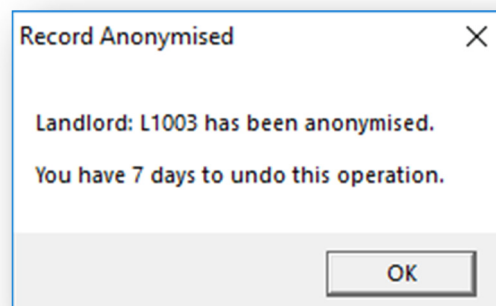


When the criteria are met, the **Anonymise record** button on the toolbar becomes active.

When clicked you are prompted to confirm.

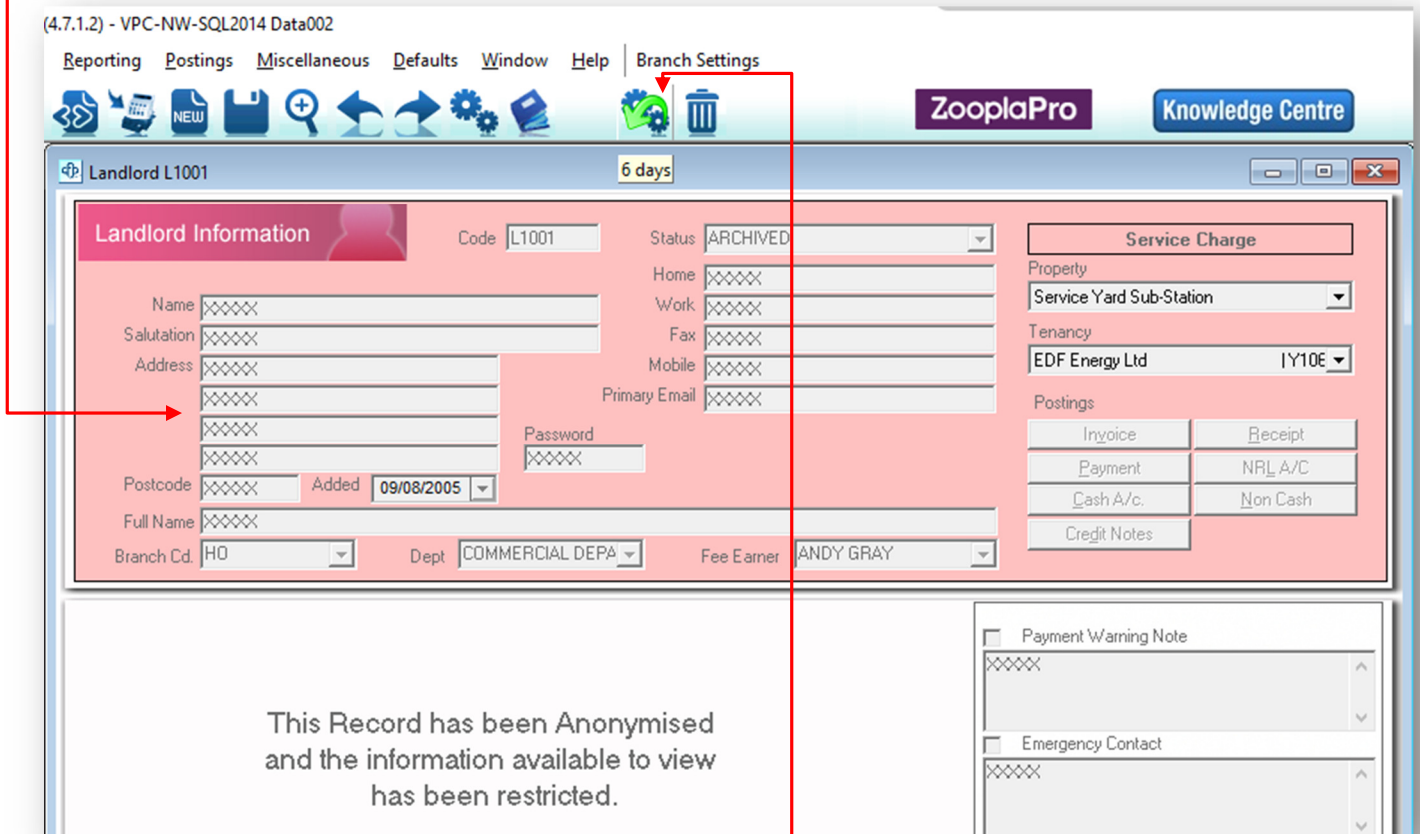


After anonymisation you are reminded you have 7 days to undo the operation.



An **Event** is recorded on the **History log** which shows the time and user that performed the anonymisation.

The record is then redacted.



Users with access to **GDPR Anonymisation Facility – Restore** can restore the record within 7 days of anonymisation via the toolbar button. Hovering the mouse over the button will display a tooltip with the amount of days left until Clean up.

7 days after anonymisation the clean up routine runs and recovery information is removed from your database.

After the **7 day** period it is not possible to restore the record. CFPwinMan support team will be unable to assist in requests to do so as the **data has been deleted** at this time.

For this reason it is highly recommended that you carefully consider to whom you provide this function.

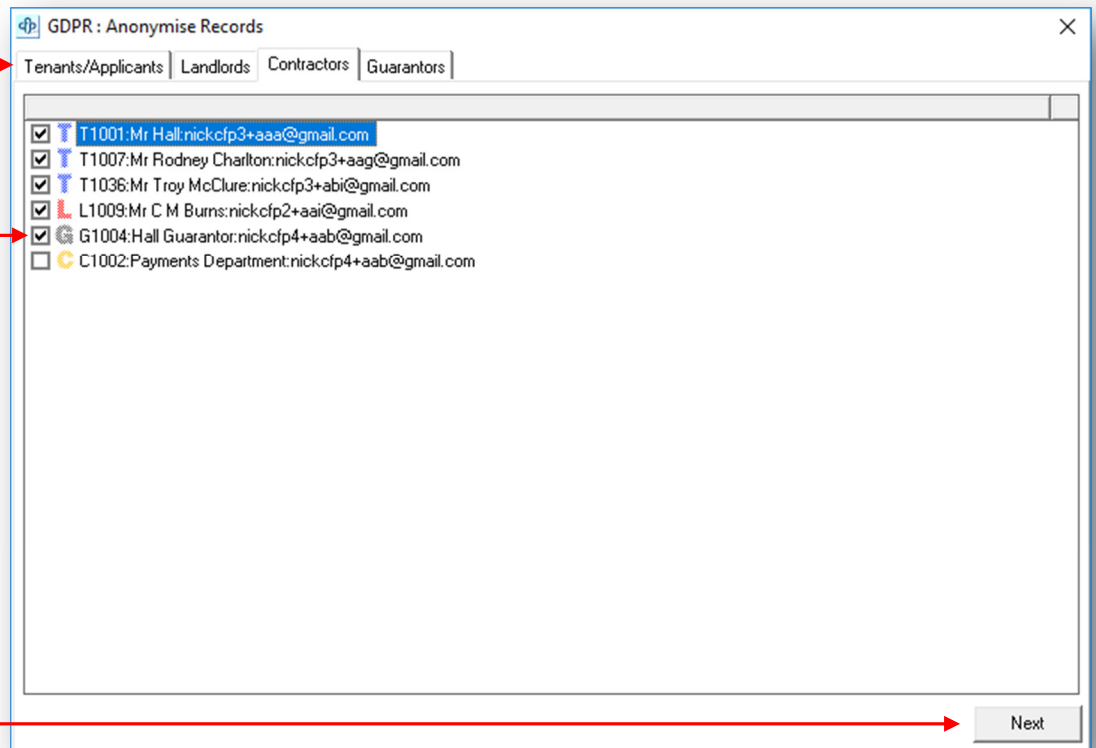
Bulk Anonymise

Records can also be bulk anonymised via a form accessible from **Miscellaneous -> Anonymisation -> Anonymise Information.**

Record types are listed on individual tabs.

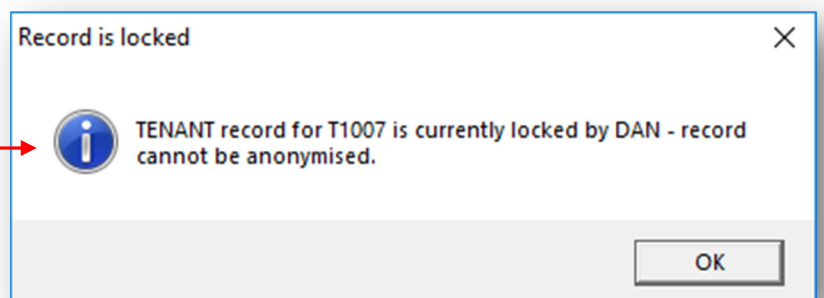
Your selection will remain as different tabs are chosen.

To anonymise selected records click **Next -> Anonymise.**



As with individual anonymisation you are then asked for confirmation to proceed. When you select **Yes** to the prompt all selected records will be anonymised.

If records are currently being accessed by other users (locked) they cannot be anonymised. You will be advised if this occurs.

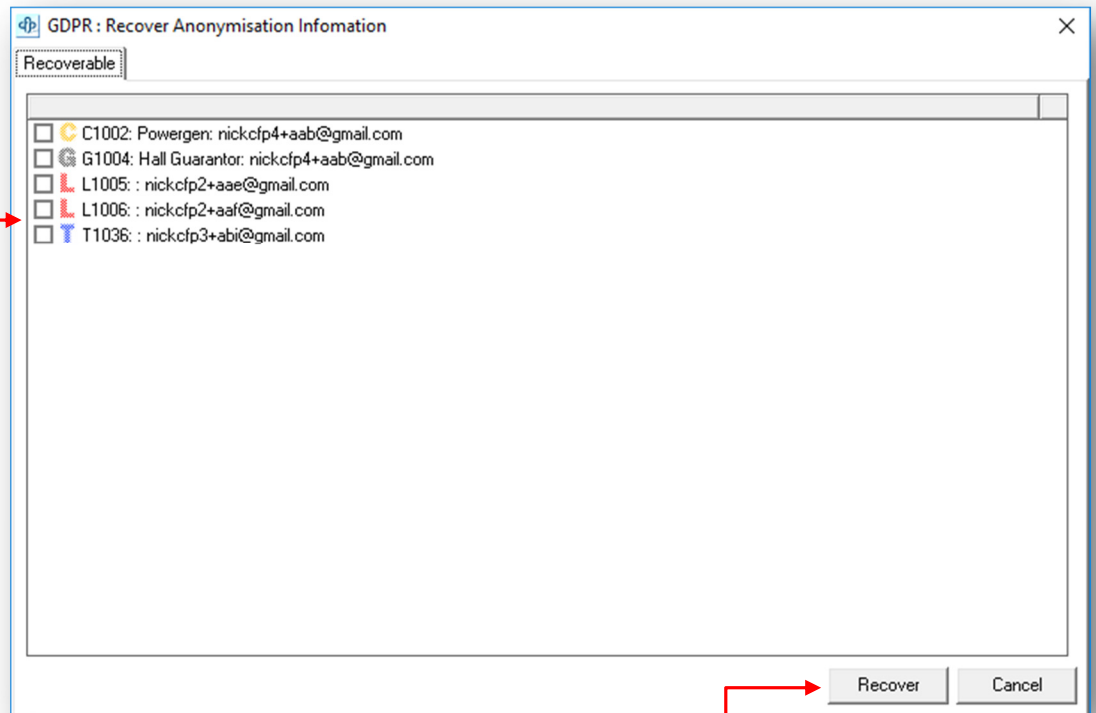


Depending on how many records you have chosen the bulk anonymisation process can take some time.

Bulk Recover

Records can be bulk restored from anonymisation via **Miscellaneous -> Anonymisation -> Recover Anonymised Information**.

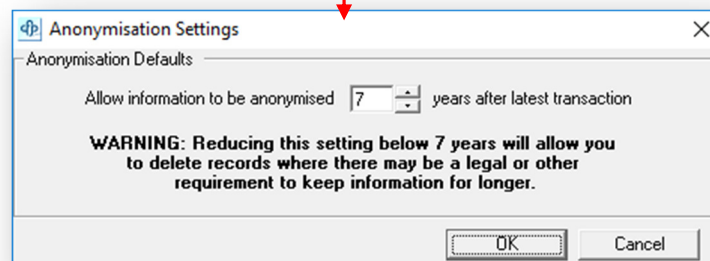
Records that have been anonymised within the last 7 days are displayed.



To recover your records simply select them in the list and click **Recover**.

This operation can take some time, especially if you have many records selected.

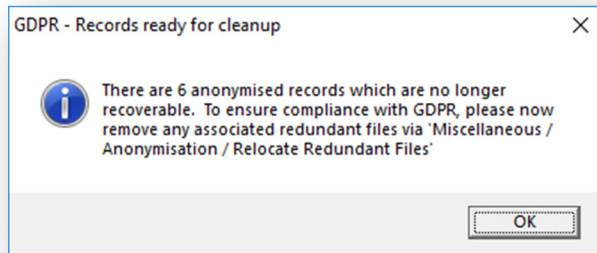
You can override the default of 7 years that disallows anonymisation. Go to **Defaults -> User Defaults -> Anonymisation**.



The option can be set between zero and seven years. Please be aware there may be implications of changing this setting as noted on the dialog.

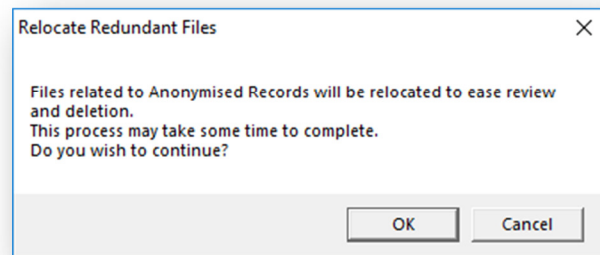
Relocate Redundant Files

The cleanup routine runs at logon and removes information that has been anonymised at least 7 days before. Any user that has been assigned the **Security setting: GDPR Anonymisation Facility - Relocate Files** is advised to run the **Relocate Redundant Files** routine available from **Miscellaneous -> Anonymisation**, and how many records will be affected.

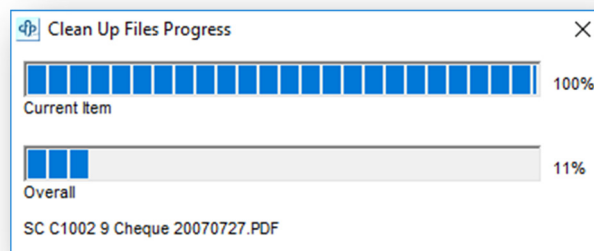


This can be done at any time, the notification will continue to be displayed until it is.

When **OK** is selected physical files (e.g. Invoices, Receipts, Statements and linked documents) relating to anonymised records will be moved from the main CFPwinMan datapath to a folder named **Relocated Files**.



This can (and will) take some time in many circumstances, depending on how many records have been anonymised and what documents pertain. You are notified of ongoing progress.

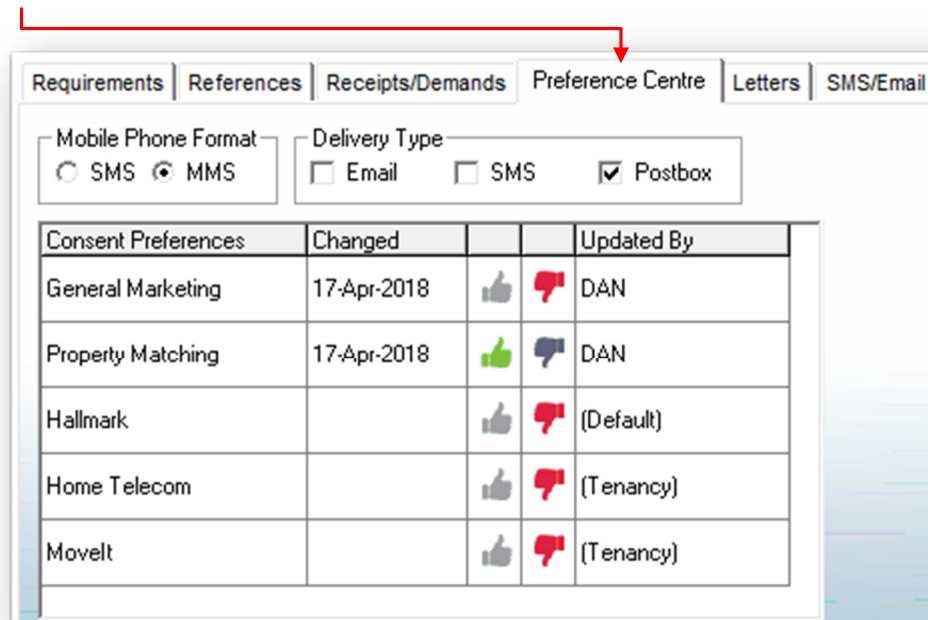


Once files have been moved they can then be easily deleted at your discretion.

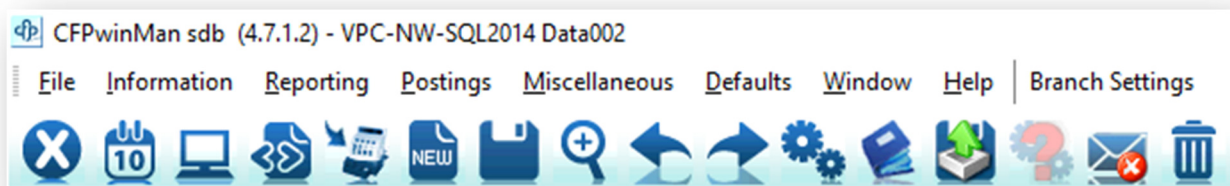
Consent Preferences

Users of CFPwinMan now have the ability to update consent preferences for all contacts. Additionally, contacts also have the ability to update their own preferences.

On contact records, i.e. **Landlords, Applicants/Tenants, Contractors** and **Guarantors**, you will notice a **Preference Centre** tab:



Users can click the thumb icons to set contacts preferences. Who did so and on what date is logged. At the point of upgrade to 4.7.1.3 existing records will have **General Marketing** and **Property Matching** set to unknown, new records will be set to no consent.



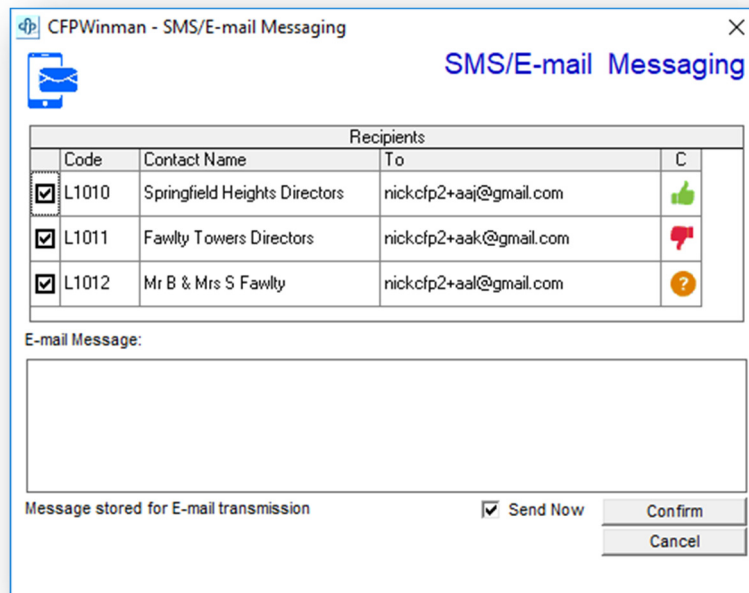
The **General Marketing** preference of each contact is displayed on the main toolbar.

If it is not set to true you are warned when you email an individual contact.

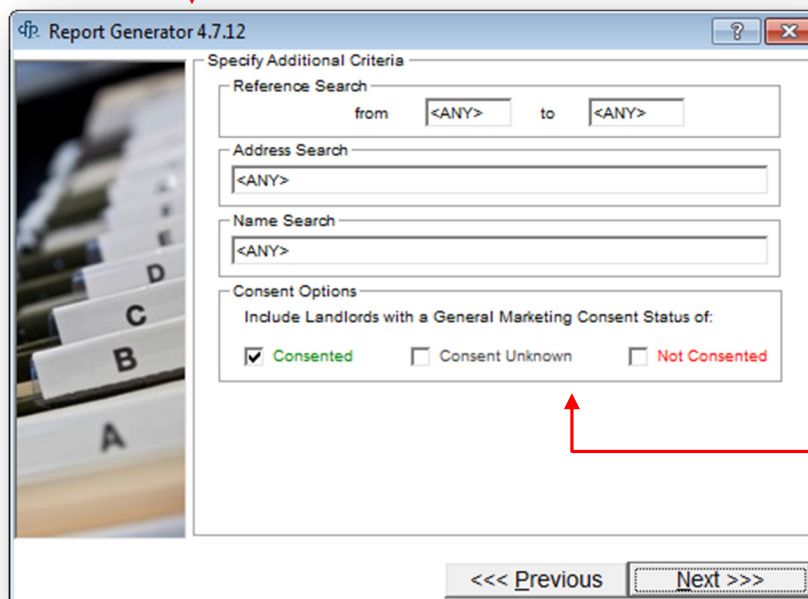


When emailing multiple recipients you will receive an updated **Messaging** dialog which displays the **General Marketing** preferences of your contacts. This occurs when, for example, you select multiple records on the organiser, right click and select **Email Landlord / Tenancy / Tenant / Contractor**.

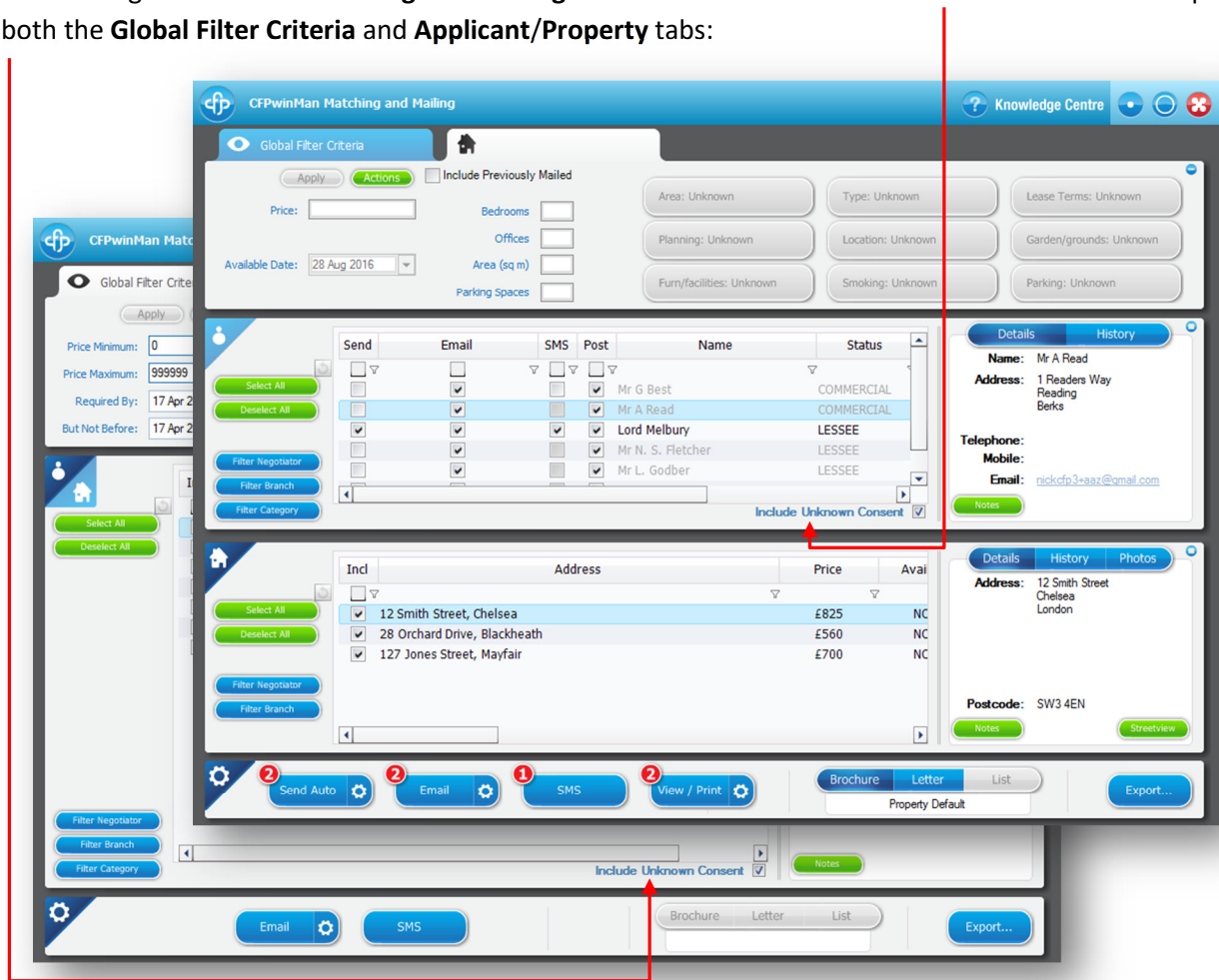
You will not be warned further upon clicking **Confirm**, so it is up to you untick contacts with no record of consent to receive communications.



Reporting -> General -> Information will also provide options to include contact records with **Consent Unknown** and **Not Consented**:

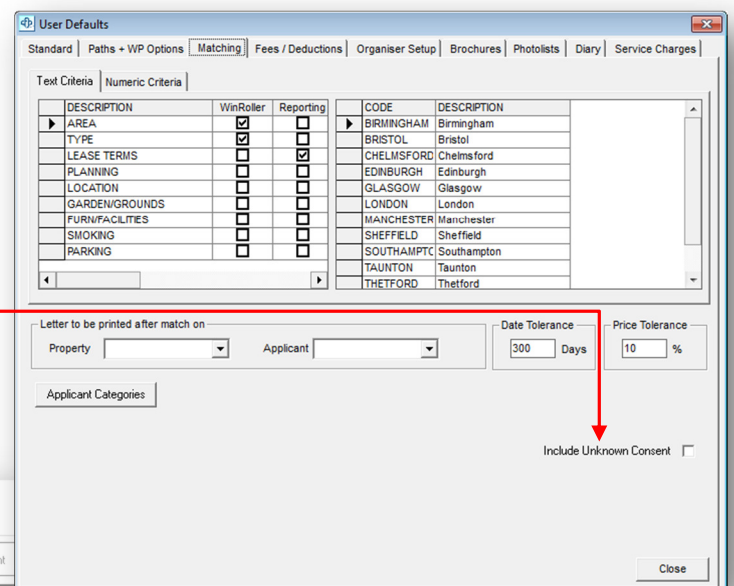


When using **CFPwinMan Matching and Mailing** users will notice a new **Include Unknown Consent** option on both the **Global Filter Criteria** and **Applicant/Property** tabs:



The option controls whether or not Applicants who have not provided Property Matching consent will be included in the mailing list. Records which are displayed using this option are listed in grey.

Going to: **Defaults -> User Defaults -> Matching -> Include Unknown Consent** will set the option on by default when Matching and Mailing is opened.



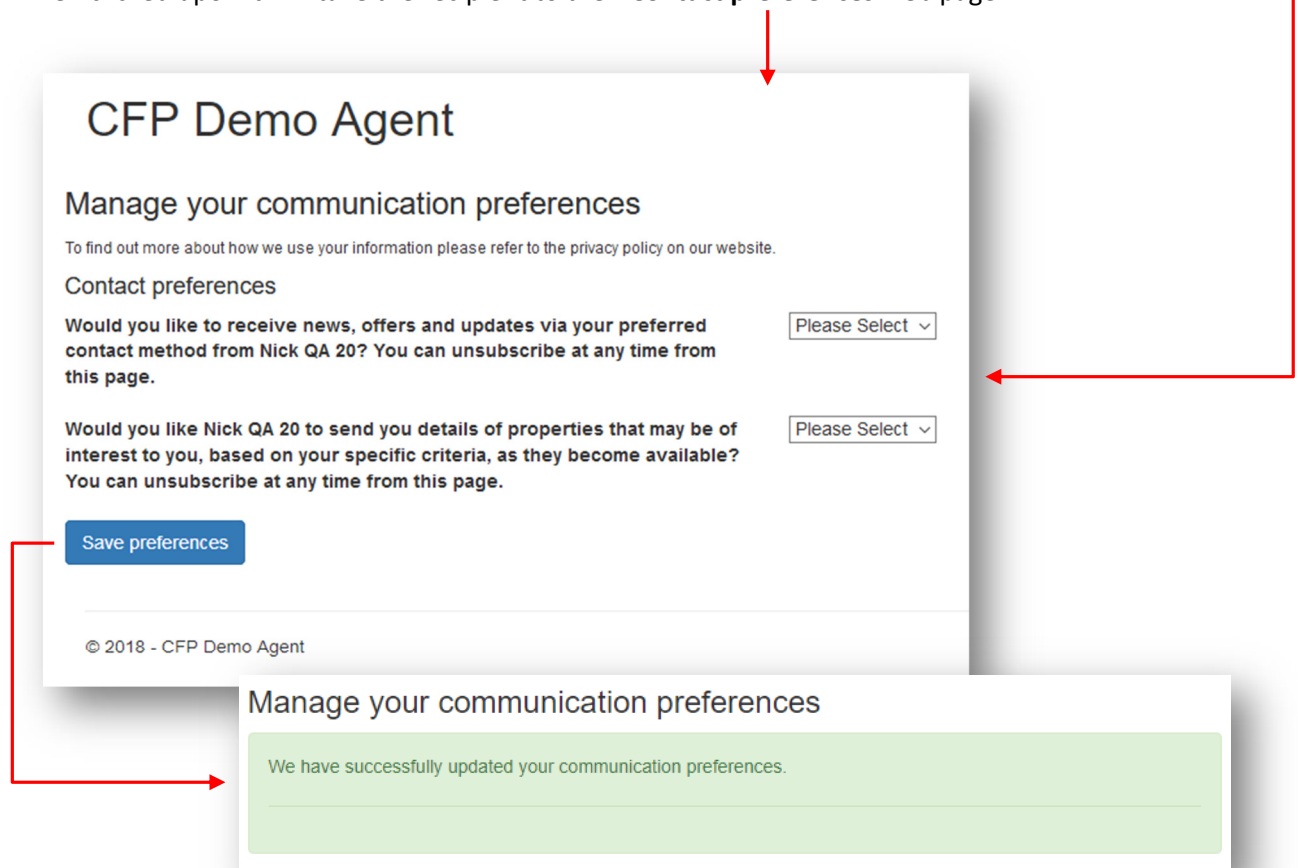
An **Event** is recorded in the **History Log** when ticked.



Email footers to contacts will now contain a unique URL labelled **Manage My Contact Preferences**.

Manage My Contact Preferences: <https://livecrm.co.uk/consent/form/v1/8161cba289f16fd5f4809754e0a01880/93969/4790/5/T-T1018/20180418141300/0/0/0/1/0>

When clicked upon it will take the recipient to their **Contact preferences** web page.



CFP Demo Agent

Manage your communication preferences

To find out more about how we use your information please refer to the privacy policy on our website.

Contact preferences

Would you like to receive news, offers and updates via your preferred contact method from Nick QA 20? You can unsubscribe at any time from this page.

Would you like Nick QA 20 to send you details of properties that may be of interest to you, based on your specific criteria, as they become available? You can unsubscribe at any time from this page.

[Save preferences](#)

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Manage your communication preferences

We have successfully updated your communication preferences.

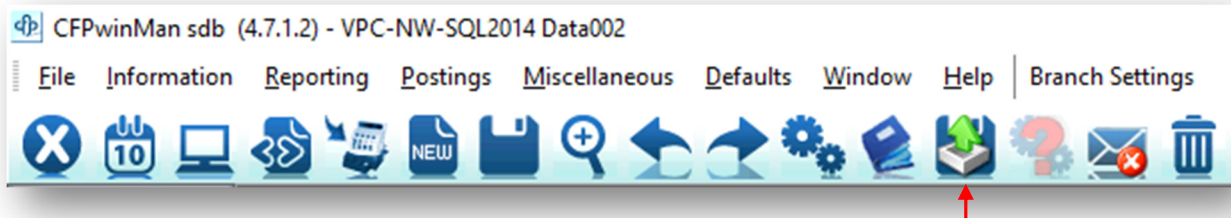
These preferences are imported into CFPwinMan at the first log in every day.

When updated via this method, your **Preference Centre** tab will display **Online** in **Updated By**.

Personal Information Request

Users of CFPwinMan now have the ability to easily export data held on any of their clients.

Applicable records (Landlords, Applicants/Tenants, Contractors, Guarantors) display the **Export Held Data** icon on the main toolbar:

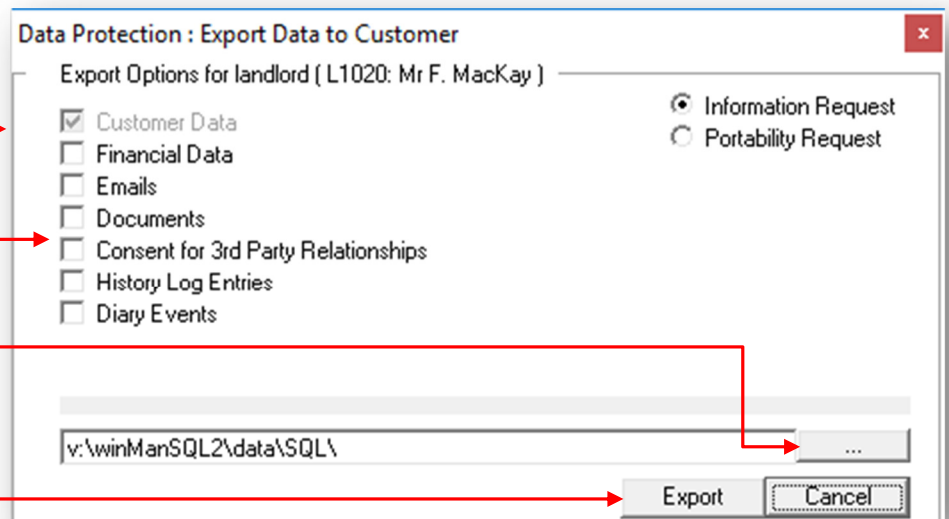


When clicked users will be presented with the **Export Data** dialog.

Select the information you wish to export.

Select a folder to export the files to.

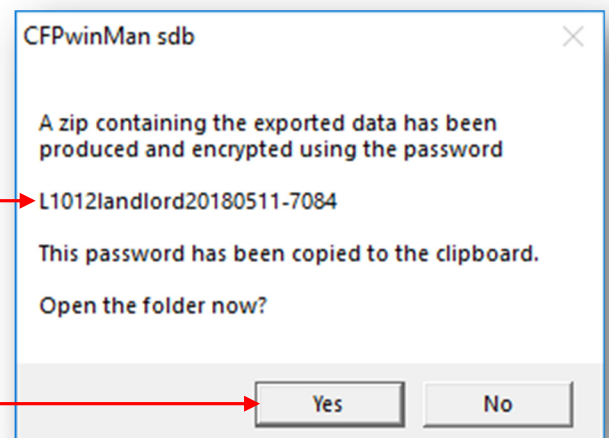
Select **Export**.



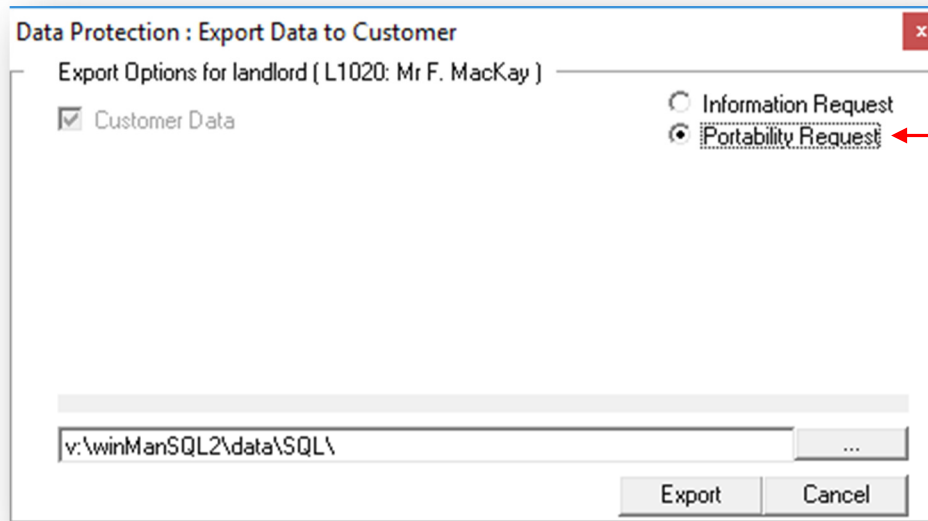
A separate file for each option ticked is created and placed into a passworded Zip file in the location specified.

A dialog shows the password, which is also copied to the clipboard for easy use.

You may choose to open the export location now by clicking **Yes**.

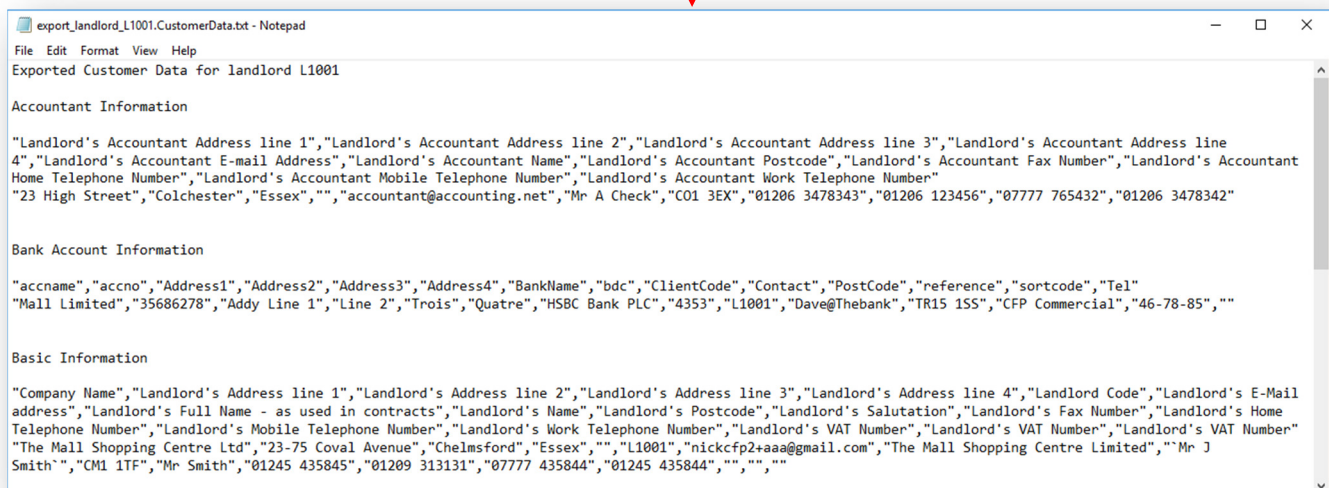


To create a file with the necessary information to create a record in other software, choose **Portability Request**.



You are not given the option to export other information.

This creates a CSV file correctly formatted for importing into other contact management solutions.



Contact the vendor of the software you are attempting to import the data into should you require further assistance in doing so.

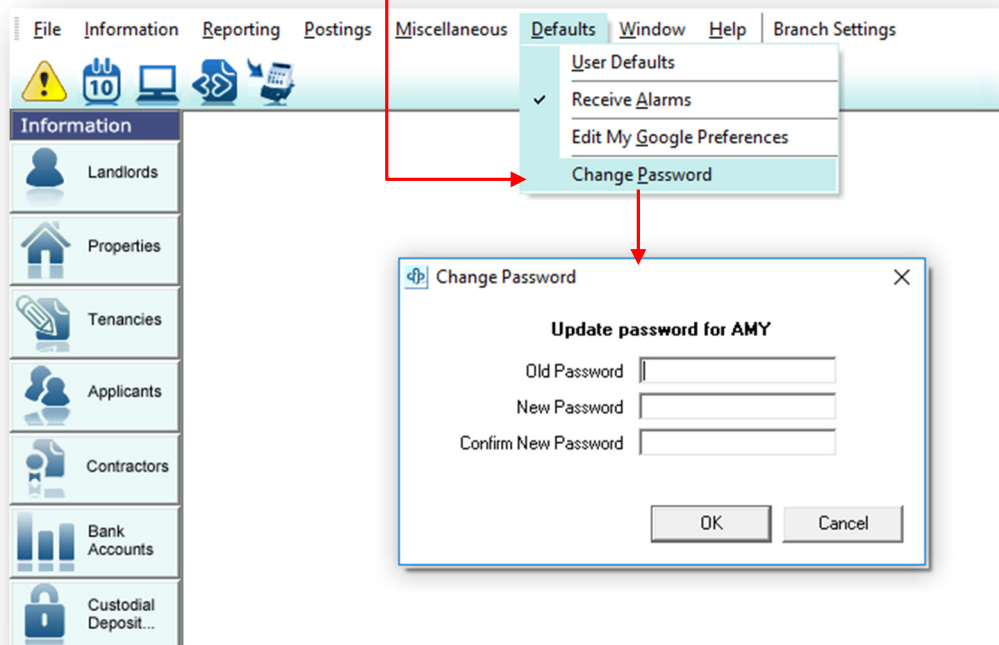
Security updates

Multiple changes have been made to CFPwinMan to enable significantly increased security and data protection. It is highly recommended both new and experienced users of the product familiarise themselves with these changes to facilitate the continued smooth running of their office.

Users change their own passwords

Users can now change their passwords without requiring access to the **User Management** functionality in **User Defaults**. This also means a user can set their password to one no other user knows, as they are now redacted in the aforementioned screens.

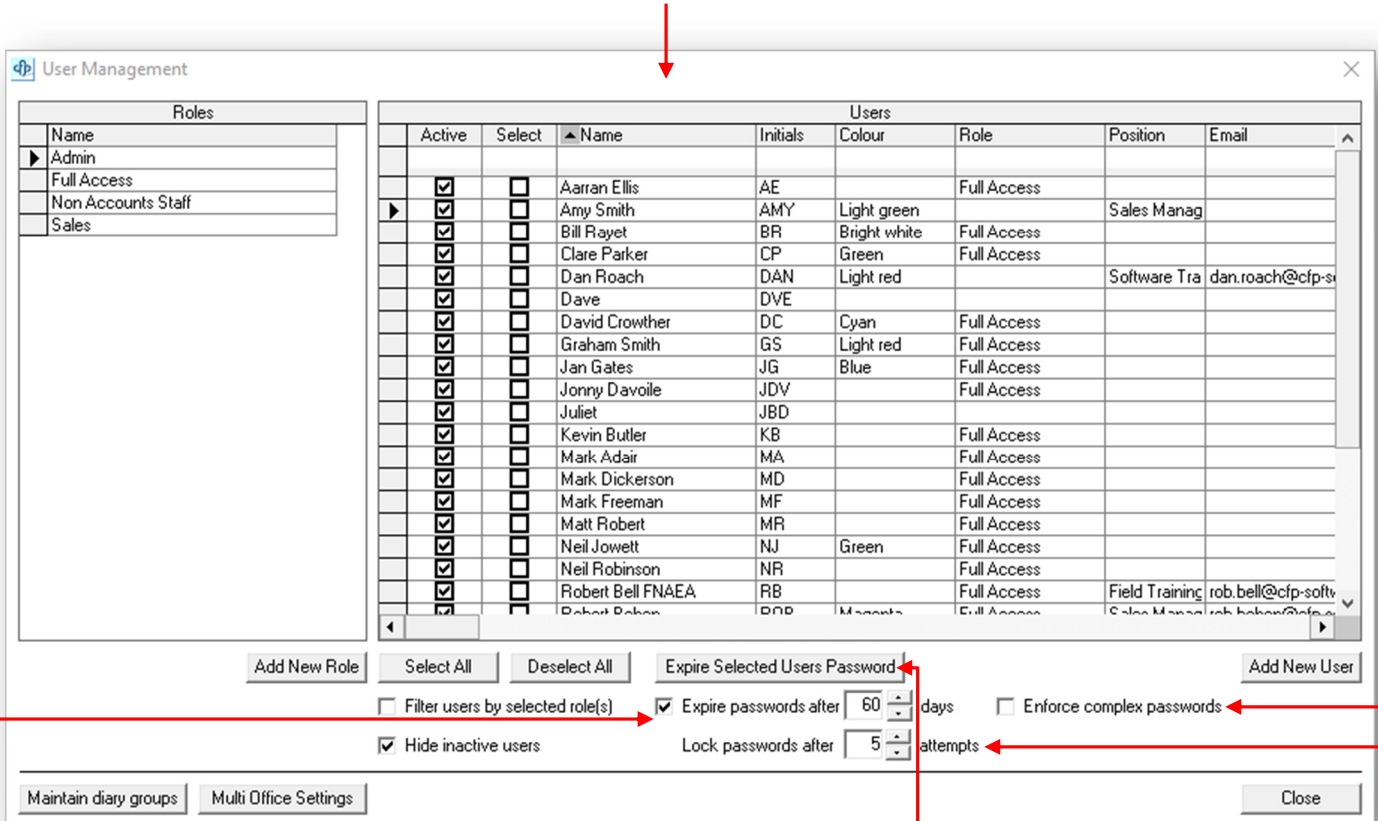
Go to: **Defaults** -> **Change Password**.



The **Change Password** dialog appears. Users need to know their **Old Password** to change it. If a user has forgotten their password they can be assigned a temporary one from a system administrator.

User Management

User Management is accessed via Defaults -> User Defaults -> Passwords.

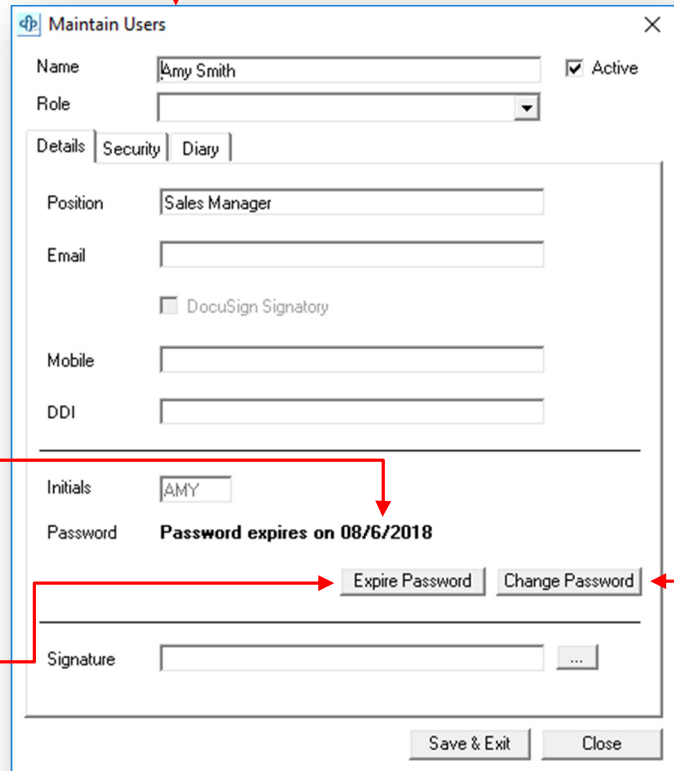


The screenshot shows the 'User Management' window. On the left is a 'Roles' list with 'Admin', 'Full Access', 'Non Accounts Staff', and 'Sales'. The main area is a 'Users' table with columns: Active, Select, Name, Initials, Colour, Role, Position, and Email. Below the table are buttons: 'Add New Role', 'Select All', 'Deselect All', 'Expire Selected Users Password', and 'Add New User'. At the bottom, there are checkboxes for 'Filter users by selected role(s)', 'Hide inactive users', 'Expire passwords after 60 days', 'Enforce complex passwords', and 'Lock passwords after 5 attempts'. There are also buttons for 'Maintain diary groups', 'Multi Office Settings', and 'Close'.

New options are available to users with access to this form:

- Expire Selected Users Password**
 Tick Select against one or more users then click this button to immediately expire those users' passwords. They will be required to set a new password at their next logon.
- Expire passwords after X days**
 Tick this and set an amount of days to automatically expire every user's password after the time period specified. This will also be enforced at their next logon after expiry. Users are advised on the logon screen when they have 7 days or less before password expiry.
- Lock passwords after X attempts**
 This is set by default and cannot be disabled. You can change the value from 3 to 10 attempts. Users are now warned at logon when an incorrect password is entered how many attempts they have remaining. If all attempts are exhausted the account is made inactive. To reactivate an account tick **Active** against that user. You may have to untick **Hide inactive users** to see the user.
- Enforce complex passwords**
 Tick this to enable password complexity requirements. Complex passwords require at least one uppercase character, one lowercase, one number and a special character. The tooltip on this button will remind you.
 When ticking this option you are also asked if you wish to force all users to change password at their next logon. This cannot be undone (even if you subsequently disable complexity).

Double clicking on any user brings up their **Maintain Users** form.



If **Expire passwords after X days** is selected then you are advised when the user's **Password expires**.

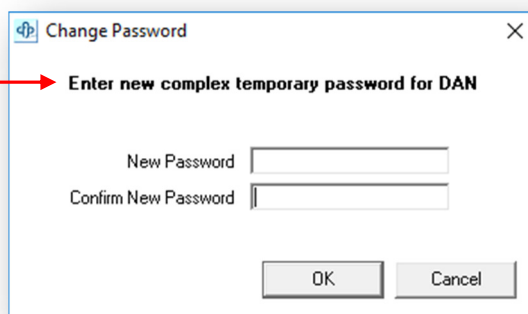
You can expire the user's password immediately by clicking **Expire Password**.

You can change the user's password by clicking **Change Password**.

If you have selected a user other than yourself clicking **Change Password** will not prompt you for their existing password. Instead the password you create will be temporary. The user will be asked to change their password at their next login - they will need to know their temporary password for this. Passwords created for new users are also temporary.

If complexity is enabled the temporary password will also need to adhere to those rules.

You are advised of this on the dialog.



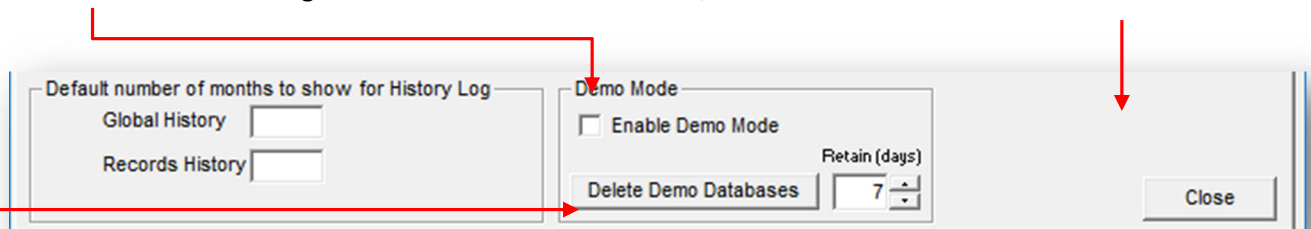
Security settings

New security settings are available. You can access these to set and disable them by clicking on the **Security** tab on **Maintain Users**. The options are:

- Contractor Tab Preference Centre
- Demo Database Facility Enabled
- GDPR Anonymisation Facility – Anonymise
- GDPR Anonymisation Facility – Cleanup
- GDPR Anonymisation Facility – Relocate Files
- GDPR Export of Data (PIR)
- Guarantor Tab Preference Centre
- Landlord Tab Preference Centre
- Tenancy Tab Details >Tab Bank Details
- Tenancy Tab Details >Tab Main
- Tenancy Tab Details >Tab Payments
- Tenant/Applicant Tab Preference Centre
- Word Processor Merge

Demo Mode

Demo Mode now has a global override for each database, located in **Defaults -> User Defaults -> Standard**.



When this option is disabled Demo Mode is not available for any user, and all existing demo databases are immediately deleted. Any users currently using Demo Mode at this time will receive an error message and need to close the client and log back into CFPwinMan.

Delete Demo Databases will initiate removal of all demo databases from the server machine. Any users currently logged into Demo Mode will be able to continue working and their data will be deleted once they are logged out.

Demo databases are automatically deleted when unused for the period specified under **Retain (days)**.