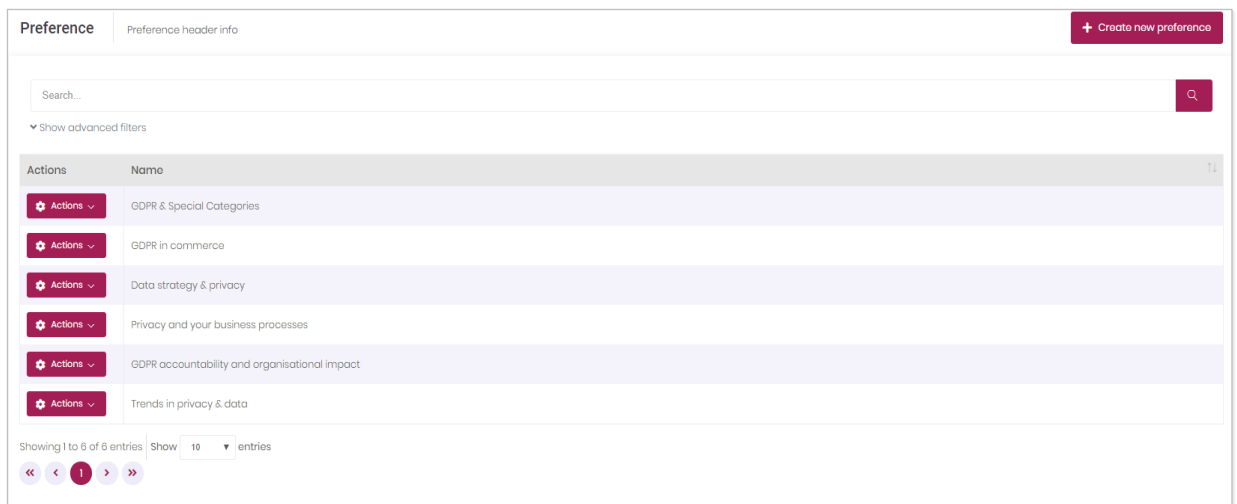


This document contains the description of 2 activities:

- ✓ The installation of the OptInsight App in Pipedrive;
- ✓ The use of OptInsight App in Pipedrive and the OptInsight backend (After installation)

Installation for Pipedrive users

1. Go to the Pipedrive marketplace and search for OptInsight and click on “Install now”
2. Fill in your Pipedrive user account credentials. If you are already logged in, you will be directed to the next screen with permissions (step 3)
3. Read the permissions and if you agree, click on “Allow and Install”
4. Create your admin account for OptInsight. Fill in a User name and password. For example, you can use the admin account of Pipedrive. Click on “New Tenant”
5. Create your own OptInsight environment in the Tenant SignUp screen. Create a preferred name for your environment in the TenantName field and your name in the Name field. Fill in the Account settings and Click on “Submit”.
6. You will be directed to your company’s OptInsight environment.
7. Click in the left column (the main menu) on “Master data” and then on “Preferences”. You can configure these in line with your commercial strategy. Examples of preferences: Themes, products, services, value propositions, industries. Click on “Create new preference”. Example of configuration:



8. Log in in your personal Pipedrive environment.
9. Read the Documentation on the next page

Important Notice: there is always a certain Sync-time between Pipedrive and OptInsight.

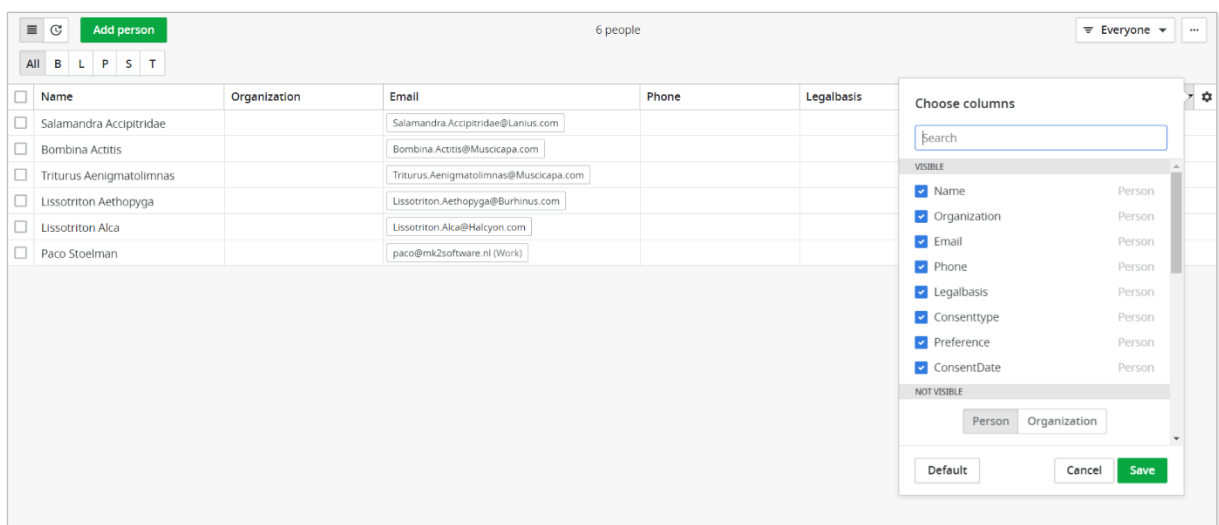
Use of the OptInsight App with Pipedrive

Adding OptInsight custom fields

Go to your contacts (people). Press the settings button in the upper right corner.

Go to the column configuration “choose columns” in your Pipedrive environment and add the following fields additionally (please note the possible alphabetical order of the fields):

- Preferences
- Legal basis
- Consent date
- Consent type



Name	Organization	Email	Phone	Legalbasis
<input type="checkbox"/> Salamandra Accipitridae		Salamandra.Accipitridae@Lanius.com		
<input type="checkbox"/> Bombina Actitis		Bombina.Actitis@Muscipapa.com		
<input type="checkbox"/> Triturus Aenigmatolimnas		Triturus.Aenigmatolimnas@Muscipapa.com		
<input type="checkbox"/> Lissotriton Aethopyga		Lissotriton.Aethopyga@Burhinus.com		
<input type="checkbox"/> Lissotriton Alca		Lissotriton.Alca@Halcyon.com		
<input type="checkbox"/> Paco Stoelman		paco@mk2software.nl (Work)		

Choose columns

search

VISIBLE

- Name Person
- Organization Person
- Email Person
- Phone Person
- Legalbasis Person
- Consenttype Person
- Preference Person
- ConsentDate Person

NOT VISIBLE

Person Organization

Default Cancel Save

Overview preferences

Click on your User account in the upper right corner and go to “Settings” and then to “Customize fields”. Go to tab “People” and scroll to the bottom of the page. Click on “Preferences” and you will see the preferences that were filled in the installation screen and also Legal basis, Consent date and Consent type. Click on “Yes” in column “Show in details view” for all four added field names.

If you want to change this values later, go to page 9 “Change preferences”.

Multiple options

Possible values Sort alphabetically

- GDPR ✎ ✖
- Events ✎ ✖
- Products ✎ ✖
- Services ✎ ✖

Enter one per line, for example (about deal type):
 Consulting
 Training
 Speaking

Name of the field

Field API key ca596c7ab15b4427928d1b93ee55f08d33dcf22

This is not our office cat walking across the laptop, but a key for this field in our API dataset. Useful for developers and for API integrations.

Save [Cancel](#)

Please bear in mind that customized fields are shared with all users throughout your company.

Important notice: There is always a value N/A (Not available) in the fields lists.

Reminder: there is always a certain Sync-time between Pipedrive and OptInsight.

Visual on custom fields in contact details

- Go to field Contacts (People). Click on an individual contact. If you go to your contact details you will see a screen as below. An example of a contact with a contract:

DETAILS ✎ ✖ Customize fields

Email llane@thedailyplanet.com (Work)

Phone [555-555-0187](tel:555-555-0187) (Work)

LastUpdated Dec 12, 2018

LegalBasis Contract

Consenttype Soft opt-in

ORGANIZATION ✎ ✖ ⚙

The Daily Planet

Address [568 Lost River Inlet, Busy, Minnesota, 55634-1391](#)

DEALS +

Closed deals (1)

Won	1	100%	\$37,358.76
Lost	0	0%	\$0

See all deals

(Automatic) classification of contact details for accountability

- Go to the menu People in Contacts, column ConsentType. All your contacts are now automatically classified as N/A.
- Column Legalbasis: default is N/A. If contacts are subject to a deal that was won in the past, they are automatically classified under “Contract”.
- You can classify your contacts manually based on your company’s privacy statement. Each contact will be synced automatically with OptInsight.

Important note: Contacts will only be synced between OptInsight and Pipedrive if there is an email-address registered under the contact.

Classification contacts from other sources by upload file

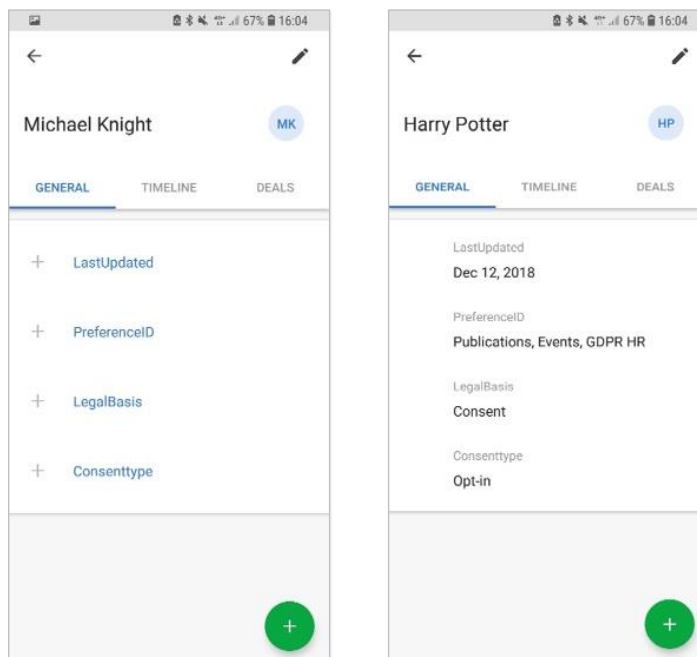
- For uploading contacts in Pipedrive from other sources, please follow the standard instructions for uploading contacts in Pipedrive. Other sources may contain information for a correct justification according to GDPR. For example if consent is registered in an external source or system like an email system. When customers follow the upload instructions from Pipedrive, the custom OptInsight app fields as created in step one will be applied to the upload.

Consenttype ▼	LastUpdated	LegalBasis
Opt-out	Dec 12, 2018	
Soft opt-in	Dec 12, 2018	Contract
Soft opt-in	Dec 12, 2018	Contract
Soft opt-in	Dec 12, 2018	Contract
Soft opt-in	Dec 12, 2018	Contract
Soft opt-in	Dec 12, 2018	Contract
Soft opt-in	Dec 12, 2018	Contract
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests
	Dec 12, 2018	Legitimate interests

Gaining Consent & Preferences of contacts: start the opt-in challenge

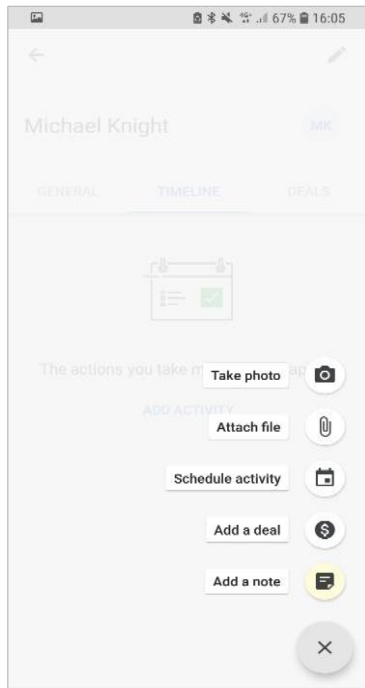
- According to privacy legislation, it is mandatory for new contacts to acquire consent for future digital communication, if there is no legal base “contract”.
 - a. The OptInsight app is already connected with your Pipedrive app automatically. In the Pipedrive app the fields as showed in the screenshot below are visible. This functionality can be used in meetings with prospects and at events in case you meet a new contact or current contact that wants to change preferences and or consenttype. Please fill in these fields together with the person who gives consent. Field “Last updated” will be generated automatically. The other fields are mandatory.

Examples:



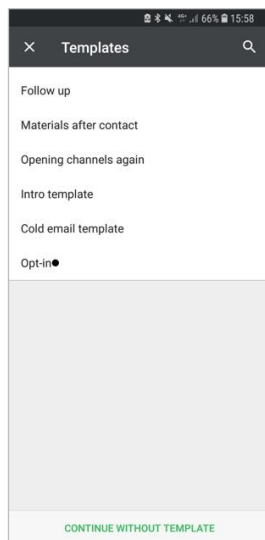
Add a new contact in the app as described above.

To acquire mandatory evidence, you can use the photo functionality of Pipedrive. For example: make a picture of the business card.



Additionally, you can send an email confirmation via the Pipedrive app (Not available in Silver Pipedrive) :

Go to mail in the app and send the confirmation of the consent to the new contact. You can use a Pipedrive mail template. We suggest to call this template the “opt-in” template (marked).



This Pipedrive email template is not standard configured. Hereby we provide you text you can use for the template.

Dear contact,

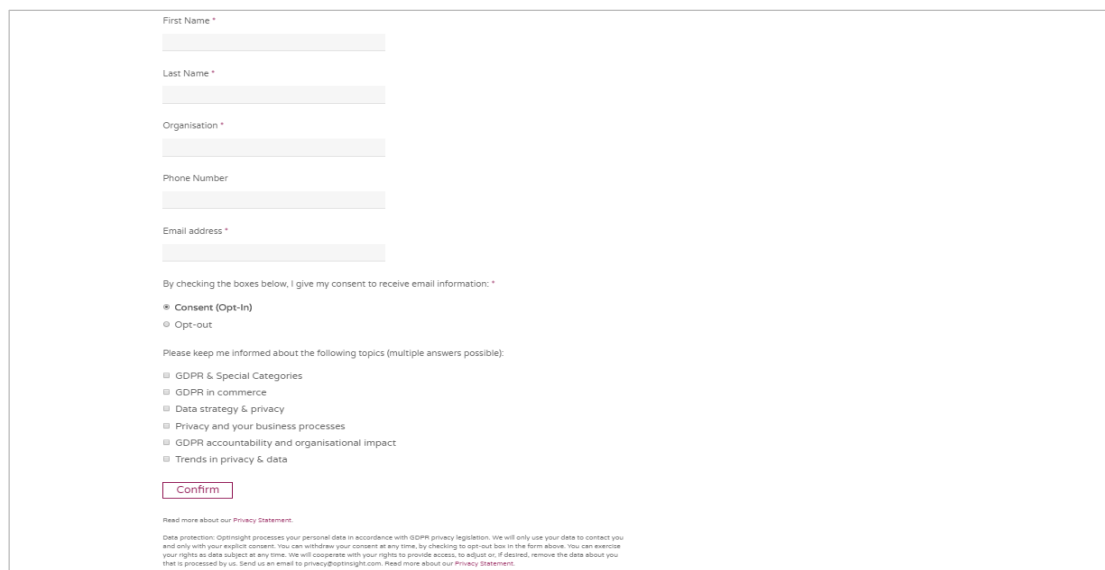
Thank you for your email consent.

We will send you occasional emails, in accordance with your personal preferences. Your consent has been registered. Your personal data will be processed by “your organisation name” within the boundaries of GDPR and ePrivacy legislation. On our website you can read our privacy statement. If you no longer wish to receive email-information from us, please send us an email to youraccountname@pipedrivemail.com with “Opt-out” in the header and we will remove your personal data from our system.

Organisation= your company name see “universal address” in your Pipedrive environment.

Check if the contact and the data are uploaded in the OptInsight app. Sync time can be about 1 minute.

- b. **Via website.** Please use <https://support.pipedrive.com/hc/en-us/articles/208493165-Pipedrive-Web-Forms>. Below we provide you an example how to configure a webform to collect preferences with consent. Remind that checkboxes never can be pre-ticked according GDPR. For this example it is necessary to pre-tick the box because of showing you the topics (preferences). By asking consent on personal preferences you collect not only personal data but also insights into what the person prefers.



The screenshot shows a webform with the following fields and options:

- First Name *
- Last Name *
- Organisation *
- Phone Number
- Email address *
- By checking the boxes below, I give my consent to receive email information: *
 - Consent (Opt-In)
 - Opt-out
- Please keep me informed about the following topics (multiple answers possible):
 - GDPR & Special Categories
 - GDPR in commerce
 - Data strategy & privacy
 - Privacy and your business processes
 - GDPR accountability and organisational impact
 - Trends in privacy & data
-

Read more about our [Privacy Statement](#).

Data protection: Optinsight processes your personal data in accordance with GDPR privacy legislation. We will only use your data to contact you and only with your explicit consent. You can withdraw your consent at any time, by checking to opt-out box in the form above. You can exercise your rights as data subject at any time. We will cooperate with your rights to provide access, to adjust or, if desired, remove the data about you that is processed by us. Send us an email to privacy@optinsight.com. Read more about our [Privacy Statement](#).

To make sure that you will have an audit-trail in OptInsight synced with Pipedrive, please configure 2 items in OptInsight

1. Configure source type under Masterdata. Create new source, for example “webform”
2. Make sure that the preferences you configure at your webform correspond with the ones you configured in OptInsight (see Masterdata and preferences)

Both actions (A and B) will be automatically synced with Pipedrive and the OptInsight app.

Automatically change consent status by received emails from contacts

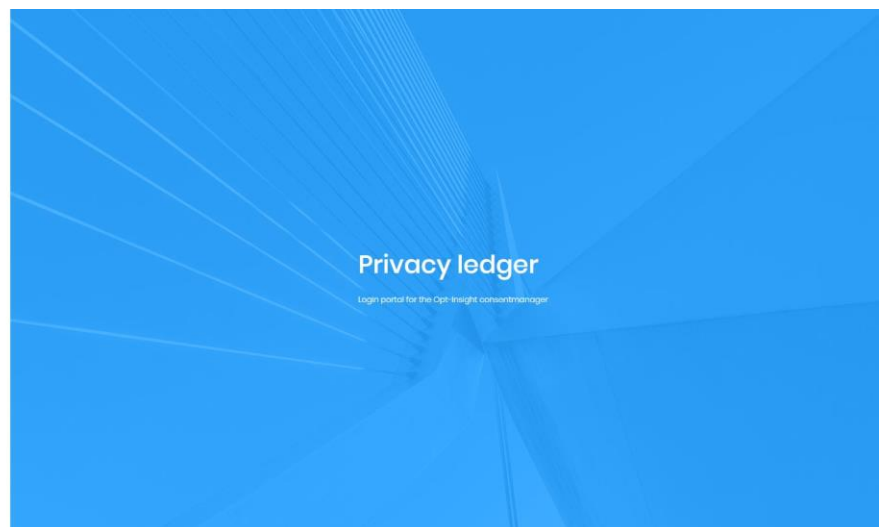
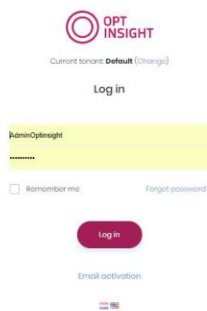
- Communication from Pipedrive to your contacts. You are now able to see with whom you are allowed to communicate with within the boundaries of the GDPR and according to personal preferences. You are not allowed to send emails to contacts for which the consent type is “opt-out” or “N/A”.

Changes in consent type, received from contacts, can easily be processed if the email address in the confirmation email is used. Pipedrive is configured by the installation of OptInsight so that the word “opt-out” is automatically recognized. If these types of emails are received the consent type will automatically will be changed on contact level.

Single view on privacy accountability in OptInsight App

- For GDPR compliance purposes you can use the OptInsight back-end app. We recommend to limit the access of the OptInsight back-end app to your compliance officers, preferable the Data Protection Officer.

Log-in



You can log in with the user and password you used during the installation procedure.

Privacy ledger

This part of the OptInsight app is the source for justification of personal data processing in Pipedrive.

Privacy Ledger

Search...

Show opt-outs

Buttons: Import contacts, Create campaign, Scan QR, Refresh

Actions	Fullname	Company	Consent status	Preferences	Legal basis	Email	Last modification time
Actions	Tjark Sui	Surtjak	Opt-in	GDPR & Special Categories, Data strategy & privacy, GDPR accountability and organisational impact	Consent	surtjak@vanderstroom.nl	02/07/2019 4:44 PM
Actions	Piet Bot	Flow BV	Opt-in	Trends in privacy & data	Consent	mbartj@opt-insight.com	02/04/2019 4:25 PM
Actions	Joachim Hunkle	No company AG	Opt-in	Data strategy & privacy, Privacy and your business processes	Consent	J.H@signal.com	02/02/2019 3:31 PM
Actions	Titusus Uroaginthus	ddd	Soft opt-in	Trends in privacy & data, GDPR in commerce	Contract	Titusus.Uroaginthus@burnhus.com	02/04/2019 9:56 AM
Actions	Alysa Tyto	Jasser NV	Opt-in	Privacy and your business processes, GDPR & Special Categories	Consent	Alysa.Tyto@Collocata.com	02/02/2019 3:23 PM
Actions	Alysa Tringa	Houtum AD	Soft opt-in	GDPR in commerce	Contract	Alysa.Tringa@Pavo.com	02/02/2019 3:23 PM
Actions	Hyla Tatrao	Dumetala	Opt-in	GDPR in commerce, Trends in privacy & data	Consent	Hyla.Tatrao@Dumetala.com	02/06/2019 12:21 PM
Actions	Hyla Shuffidoa	WJ AG	Soft opt-in	GDPR & Special Categories, Trends in privacy & data	Contract	Hyla.Shuffidoa@Anthonygac.com	02/02/2019 3:29 PM
Actions	Lisoutron van der Scolepa	Hacke GmbH	Soft opt-in	Privacy and your business processes	Contract	Lisoutron.Scolepa@Anvar.com	02/02/2019 3:29 PM
Actions	Polobatos van der Securivestra	Final G AG	Soft opt-in	Privacy and your business processes, GDPR in commerce	Contract	Polobatos.Securivestra@Maltripic.com	02/02/2019 3:29 PM

Showing 1 to 10 of 8 entries

The privacy ledger contains the GDPR legal bases of processing data:

- Public task
- Legitimate interest
- Contract
- Legal obligation
- Consent
- N/A (if the legal basis is not known)
- Vital interest (This ground is on request available because most organizations do not use this)

Consent type is divided in 3 possible options:

- Opt-in (only in combination with legal basis consent)
- Soft opt-in (only in combination with legal basis contract)
- Opt-out (only in combination with legal basis N/A)

Change preferences

Go to preference under “Master data”, menu “Preferences” and edit or delete preferences under “actions”

Preference Preference header info Buttons: Create new preference

Search...

Show advanced filters

Actions	Name
Actions	GDPR & Special Categories
Actions	GDPR in commerce
Actions	Data strategy & privacy
Actions	Privacy and your business processes
Actions	GDPR accountability and organisational impact
Actions	Trends in privacy & data

Showing 1 to 6 of 6 entries | Show 10 entries

Audit-trail

This part of the app is the audit-trail. If privacy authorities ask for evidence on justification of data processing, your company can guide them to OptInsight. The app can also be used for Pipedrive users for executing the GDPR data subject rights of your contacts.

Content library item	App user	Backend user	Timestamp	Consent status	Preferences	Legal basis	Source
		Admin Optinsight	01/23/2019 9:26 PM	Opt-in	Privacy and your business processes, GDPR & Special Categories	Consent	CRM
		Admin Optinsight	01/23/2019 9:26 PM	Opt-in	Privacy and your business processes, GDPR & Special Categories	Consent	Smartphone App
		Admin Optinsight	01/23/2019 9:24 PM	Opt-in	Privacy and your business processes, GDPR & Special Categories	Consent	Phone call
		Admin Optinsight	01/23/2019 8:08 PM	N/A	Privacy and your business processes, GDPR & Special Categories	Contract	Smartphone App
		Admin Optinsight	01/23/2019 4:28 PM	N/A	Privacy and your business processes	Contract	Visits
	Marlijn van den Corput	Admin Optinsight	01/23/2019 4:27 PM	Soft opt-in	Privacy and your business processes	Contract	Website
		Admin Optinsight	01/22/2019 2:07 PM	Soft opt-in		Contract	CRM

Showing 1 to 7 of 7 entries | Show 10 entries

Opt-in /out: Manual changes in Consent Type and Preferences

This part of the OptInsight back-end is only for the admin for making manual changes for special circumstances. Only use this with admin OptInsight of your organization.

Edit consent status: Triturus Uraeginthus

Fullname
Triturus Uraeginthus

Consent types
Soft opt-in

Preferences
 Trends in privacy & data
 GDPR in commerce

Legal basis
Contract

App user
Select an option

Email
Triturus Uraeginthus@Burhinus.com

Source type
Select an option

Send confirmation email

Cancel Save

End of the instructions