

Spotlight - Data Protection Compliance

Preparation

1. Import standard UK Demo Data
2. Login with
Standard ID: sample@hansaworld.com
Passworld: Sample99

Script

Let's take a look at how Standard ERP's functionality can help your business comply with GDPR.

Data security is a must with GDPR and Standard ERP's enhanced Encryption method ensures that all your data and that of your customers' is secure.

Server level security is always a consideration for any organisation.

You can easily set up the MyStandard portal to manage who has access to your company server and at which level.

ACTION: Open: mystandard.hansaworld.com > log in with Standard ID and Standard ID password > select your test server > Click on Manage Users

Per each employee, you can choose to grant full access or limit access to specific functions.

ACTION: Show access rights setup on MyStandard

You can also see a list of completed backups and where they are stored. You will notice that they are encrypted for security.

ACTION: Click on Option "List Backups" and show Files and location

To prevent security breaches the system can be set up to require two-factor authentication for changes to any users Standard ID password.

The changes need to be confirmed by using codes sent via SMS to a registered phone number and/or recovery email address.

ACTION: Click on My Account > Add Recovery email and Recovery phone

There are many features within Standard ERP to help you stay in control of your data.

ACTION: Open Standard ERP and log in with Sample Standard ID and password

Many customers do not wish to be added to mailshots or receive emails about 'what's on sale' while others don't mind at all.

Standard ERP makes it easy to track who to contact and who to leave out of your campaigns. You can restrict sending emails and CRM letters to these customers or contact them by simply marking it on their contact card.

ACTION: Open Contact register > Open Customer card 001 > Click on Terms tile > mark checkboxes No Mass Letters and No Mass Emailing > Save record

To be absolutely sure employees are not reaching out to the wrong audience, you can set up notifications for any changes made.

**ACTION: Switch to Technics module > Settings: Register Observations > Create New > Select Register: Contacts > add Target: your Standard ID > In the matrix: Line 1. Choose Type: Equals > Field: NoMailPosting > Parameter1: 1
Line 2: Choose Type Watch > Field NoMailPosting
NOTE: Setup is not shown on a video. It works only if you have external e-mail set up.
For demo purpose, you can create "alert" email in the mailbox directly**

Stay compliant with Standard ERP! Be more precise with your e-mail campaigns and maintain customer satisfaction.

Businesses often face the risk of important information going missing or getting into the wrong hands. With Standard ERP, confidential business information can be stored in conferences and access can be limited to a select group of people or just one person.

You can protect your data by limiting access to employees. Role-based logins can be created for individuals or groups and from there you can limit the actions they can perform.

Let's look at how we can prevent the salesperson from changing contact details on a customer's record.

ACTION: Switch to Module: System > Settings: Access Groups > Select "SALES" and open > Set > Type: Action, Item: Change Contact Number, Level: None > save the record

International companies need additional security for their data as they may have employees working in several countries and therefore want to limit their access or grant access to certain employees across all companies in the organization.

Standard ERP's flexible user permissions allow you to securely define users globally and determine their access rights per company, thus controlling data access.

**ACTION: Switch to Module: Technics > Open Registers: Global User > Create: New Global User > Add Signature: LD > Set Start Access Level: No Access > save the record
Then go to TAB Companies and select company> Add Access Group and Start Access Level >> save thge record and close**

We take GDPR compliance seriously at HansaWorld and are continually improving our products. You can find the latest information on www.hansaworld.com/GDPR