

GDPR accelerator for

Microsoft Dynamics 365 Customer Engagement

INSTALLATION & SET UP GUIDE



Change control

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This user document is valid for the GDPR accelerator *version 1.1* based on Microsoft Dynamics 365.

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2 INTRODUCTION

2.1 Objective

GDPR is the current EU personal data protection regulation. In 2018 it replaced legislation in all EU countries and introduced new requirements and limitations for all companies.

User rights are considerably expanded under GDPR.

This accelerator helps companies to be compliance with the personal data they have in Dynamics 365 CE.

This accelerator includes two modules:

- > Consents database management.
- > Search GDPR: feature to help the data responsible to perform users' rights.

This accelerator plugs into Microsoft Dynamics 365 CE, and can be used for all Dynamics CEM modules: Sales, Customer Service, Field service, etc.

2.2 Application pack contents

The package should contain the following solutions:

- > GDPR
- > FrameworkIP

The solution includes following languages: English, French, German, Spanish and Hebrew.

> Documentation is available in the accelerator section Corp Intranet SharePoint site at this address:

<u>https://prodwarecloud.sharepoint.com/sites/pww-ibs-</u> public/SitePages/ProdwareSolutionCatalogue/CustomerEngagment/accelerators/CEMGDPRAccelerator.aspx



3 SET UP AND INSTALLATION GUIDE

3.1 System requirements

This accelerator can be installed on:

> Microsoft Dynamics 365 Online

To be able to use this functionality your license must be up to date. If necessary, contact your reseller for more information about your license.

3.2 Installation of the package on Microsoft Dynamics 365

Be careful, the installation can be done only by a system administrator user.

- 1. Open your browser
- 2. Open your Dynamics 365 CRM environment
- 3. Navigate to Settings> Solution
- 4. Then click on Import
- 5. And Follow the assistant

For more details consult this page: <u>https://docs.microsoft.com/en-</u> <u>us/dynamics365/customer-engagement/customize/import-update-export-solutions</u>.

3.3 Upgrading to a new version

Important: Before any installation and / or modification, you must create a backup of your solution you can restore if you encounter issues with your set-up.

When upgrading from a previous version, the actions are the same as for first installation, please refer to chapter 2.2.

All your previous data will be saved and no further action is needed.

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3.1 Security Roles

The solution contains two security roles:

- > GDPR_User: Gives access to the GDPR Search and Consents.
- > GDPR_Administrator: Gives access to the GDPR Entities configuration and Consent types.

The GDPR_User Security Role should be granted to all users.

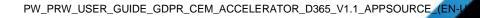
3.2 Module set up

3.2.1<u>Types of consent</u>

You need to configure the Types of consent.

1. Go to menu \rightarrow Types of consents and click on New.

	Consent Type *	Conditions Version	Default Channel	Time Limit	1	
	Allow giving data to third parties	2.1	Web		365	
	Communications by mobile (text message)	1.62	tive		365	
	Newsletter subscription v1.0	1.0	Web		365	





2. You need to complete the following main information:

Field	Description				
Consent Type	Name of this consent type.				
Default Channel	Channel by default for this consent type. The channel can be set in the consent.				
Conditions Version	Version of the Legal type of consent.				
Time Limit	Limit of time that will set up the expired limit in the consent record. When the expired date arrives the consent will be automatically revoked. It means that the record will be inactive and the revoked date will be set.				
Description	Description of this consent type.				

This is an example of the Type of consent.

General							
Convert Tiple*	Newlettel subury	attan at a			Department	Convert to pover the full approximation to our Newcletter	
Detail Dunner						to a contract constraint and a second	
	weth						
Conditions Version	1.0						
time Land.	345						
Related Concerns							
							+ =
Connexed Typer	Davel	Cardant +	1 tred	[Consection a] In	ing and Names Sale		
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navsietar subscription	WIN SHIE	Autory Onesi		12/1/2020	13/4/2020		
0.4238							H 4 FORT N

3.2.2 GDPR Search

Before starting to work with the GDPR Search tool you need to configure what entities this feature will be based on.

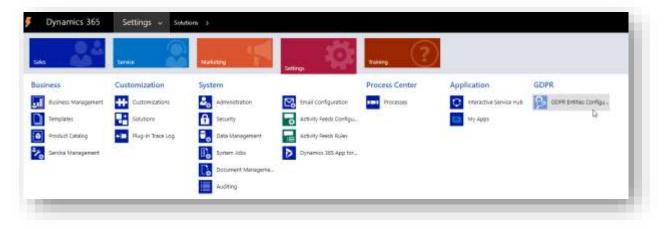
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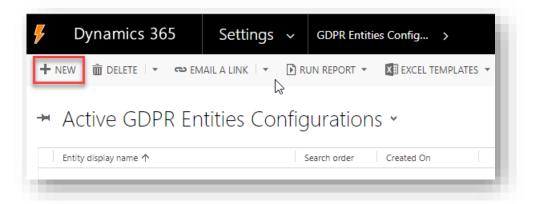
Only the users with the GDPR Administrator role can set up the configuration.

Create a new GDPR Entity Configuration

1. Navigate to Settings> GDPR Entity Configurations.



2. Click on New.



3. Fill the following fields:

Field	Description
Entity Name	Configure all the entities that contains personal information or information linked to personal data that you want to give to your client.
Search Order	Set when the entities will show in the results pane.

4. Click Save.

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5. By default, all the Text / Memo / Lookup fields are added to the configuration.

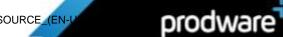
pportunity 🛥						
General						
Ditty new (Opportunity	+1		Tearch under	3		
Searched Fields						+ =
						P
Total Registi Agent IV	2 Daring Name	Type	Autom	Industrie Starth to Contact	Include in Search by Load	
scountaine		Lookap	140	No.	No.	
accountidyperaname		Lookup	NO	NE	(100)	
campaignidistrie	Source Compaign	Lookup	140	140	No	
oviaciónem		Lookup	740	705	140	
ordatkityoriename		sookup	No	10	No.	
(read of 20 yearson	Cheeked By	Lookup	NO	No	160	
matethy/mene	Created By	Lookup	NO	No	no.	
instation and formerse	Created by (Delegate)	Lookup	340	No	No.	
charles so that all for participants	Created By (Delegate)	Tookip	(io	No	No.	
contractuations	Current Situation	Multiple Lines of Test	1940	No	No	
automotidaanse .	Retential Customer	Lookup	No	Yes	Ne	
autorest/united	Potential Customer	Lookup	790	No	Re .	
Cuttommed.	Cottomer Need	Multiple Lines of Text	NO	140	No	

TIP: Reduce this list manually in order to increase search performance.

Search GDPR Fields Configuration

There are several parameters that can be set in the Fields configuration:

- > Anonymize: Check this option if this field contains personal information that should be anonymized. For example, in an invoice: contact name, identified code, contact data. It is unchecked by default.
- > By Contact or By Lead: Check this options if you want to show this linked record when searching by Contact or by Lead. It is checked by default.



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Contact #	97.7m	d III	Charley Trans	# Potential Culturer	
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GDPR Search Report.

We recommend you create a report to give to your customers when they ask for all their data in your database.

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As standard Dynamics 365 Word templates cannot be moved between different environments, this report is not included in this package.

The consultant who is installing this product can configure it for the specific customer, including the company logo, text and all the information that comes from the GDPR Search.

https://docs.microsoft.com/es-es/dynamics365/customer-engagement/admin/usingword-templates-dynamics-365

