

Free GDPR Add-on Solution for Microsoft Dynamics 365 CRM Customer Engagement

As a contribution from Mohamed Mostafa (Microsoft MVP – TechLabs London) to the Microsoft Dynamics 365 community, we are offering this Dynamics 365 GDPR Add-on Solution free to the community both Customers and Partners. You can also find a link to download the solution for free [at the end of this post](#).

The solution delivers the following functionality and Data Subject requests:

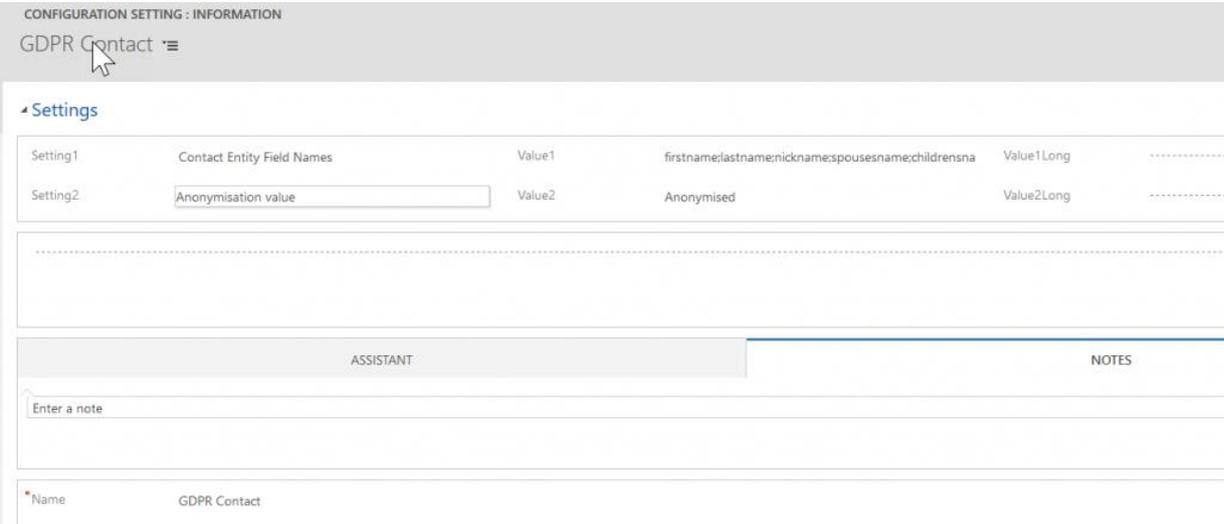
1. Consent Management
2. The Right to be Forgotten (anonymising contacts information)
3. Personal Identifiable Information (PII) Management

The solution includes the following components:

1. “Consent” Custom entity with relationship to Contact entity
2. New form for Contact entity called GDPR and few additional fields on Contact
3. “Configuration Settings” entity for capturing config information
4. A Plugin Assembly for the Anonimisation function
5. A Workflow for creating tasks to renew Consent at 30, 7 and 0 days from consent end date.

For the solution to work properly, once you import the solution, you will need to do the following:

1. Create a Queue called “GDPR” so that tasks for consent renewal created by the workflow can be added to this queue.
2. Create a Configuration Setting record called “GDPR Contact” as the screenshot below. You need to enter names of fields you want to be anonymised separate by semicolons.



The screenshot shows the 'CONFIGURATION SETTING : INFORMATION' page for 'GDPR Contact'. The 'Settings' section contains two rows of configuration data:

Setting	Field Name	Value	Field Name	Value
Setting1	Contact Entity Field Names	Value1	firstname;lastname;nickname;pouesname;childrensna	Value1 Long
Setting2	Anonymisation value	Value2	Anonymised	Value2 Long

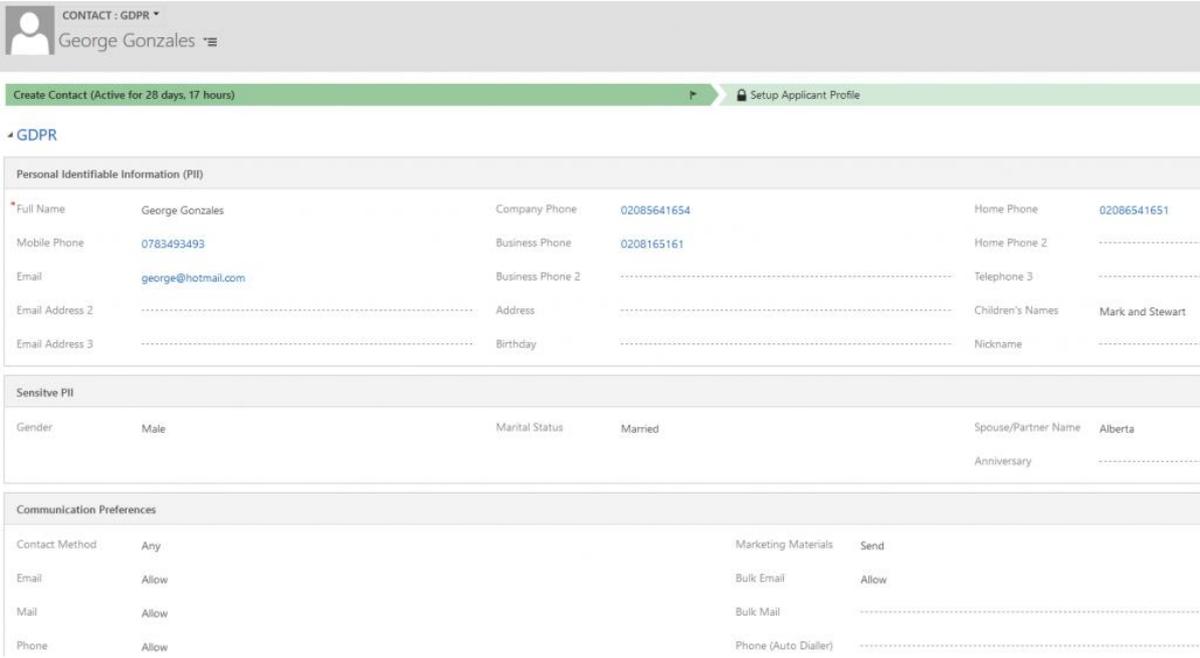
Below the settings table, there is an 'ASSISTANT' tab and a 'NOTES' section with an 'Enter a note' input field. At the bottom, the 'Name' field is populated with 'GDPR Contact'.

By <http://MohamedMostafa.co.uk> and <http://TechLabs.London>

The solution takes the approach of anonymising the contact information without actually deleting the contact record. This means everything stays the same, attributed to the same contact record but the record itself will no longer hold any personal identifiable information (PII) of the customer.

Here are screenshots on how the “Anonymise” button works:

GDPR Contact Form:



CONTACT : GDPR
George Gonzales

Create Contact (Active for 28 days, 17 hours) Setup Applicant Profile

GDPR

Personal Identifiable Information (PII)

Full Name	George Gonzales	Company Phone	02085641654	Home Phone	02086541651
Mobile Phone	0783493493	Business Phone	0208165161	Home Phone 2	.....
Email	george@hotmail.com	Business Phone 2	.....	Telephone 3	.....
Email Address 2	.....	Address	.....	Children's Names	Mark and Stewart
Email Address 3	.....	Birthday	.....	Nickname	.....

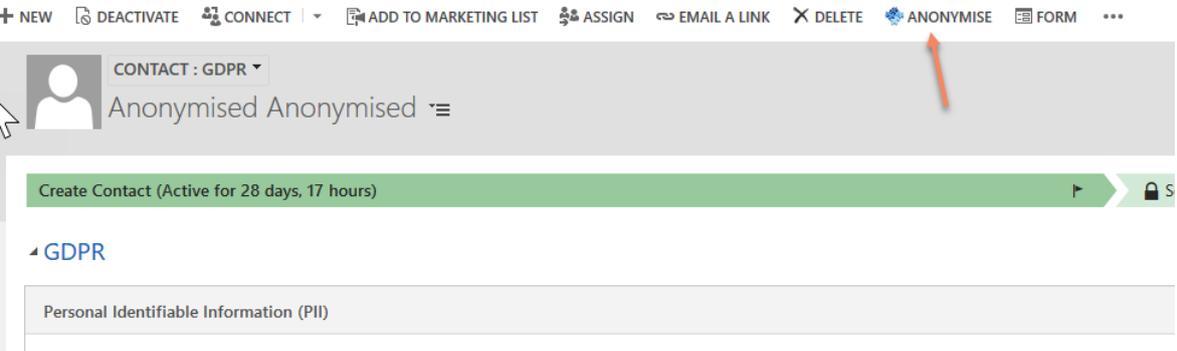
Sensitive PII

Gender	Male	Marital Status	Married	Spouse/Partner Name	Alberta
				Anniversary	.....

Communication Preferences

Contact Method	Any	Marketing Materials	Send
Email	Allow	Bulk Email	Allow
Mail	Allow	Bulk Mail	.....
Phone	Allow	Phone (Auto Dialler)	.....

Click on “Anonymise” button:



NEW DEACTIVATE CONNECT ADD TO MARKETING LIST ASSIGN EMAIL A LINK DELETE ANONYMISE FORM

CONTACT : GDPR
Anonymised Anonymised

Create Contact (Active for 28 days, 17 hours)

GDPR

Personal Identifiable Information (PII)

By <http://MohamedMostafa.co.uk> and <http://TechLabs.London>

Anonymised Contact record:

CONTACT : GDPR ▾
Anonymised Anonymised ⌵

Create Contact (Active for 28 days, 17 hours) ▶
Setup Applicant Profile

GDPR

Personal Identifiable Information (PII)

Full Name	Anonymised Anonymised	Company Phone	02085641654	Home Phone	Anonymised
Mobile Phone	Anonymised	Business Phone	Anonymised	Home Phone 2	.....
Email	anonymised@email.com	Business Phone 2	.....	Telephone 3	.....
Email Address 2	anonymised@email.com	Address	.....	Children's Names	Anonymised
Email Address 3	anonymised@email.com	Birthday	.....	Nickname	Anonymised

Sensitive PII

Gender	Male	Marital Status	Married	Spouse/Partner Name	Anonymised
				Anniversary	.....

I hope this solution helps many in the Dynamics 365 community. If you find this solution helpful, please review and/or vote on this solution. I'll be happy to support the solution where I can (and based on its popularity).

N.B. The solution is provided as is with no warranty. It does not guarantee GDPR compliance and your organisation will still need to ensure they are compliant.

Mohamed Mostafa – Microsoft MVP – Solutions Director. TechLabs London

<https://www.linkedin.com/in/mohamed-i-mostafa/>