Dynamics Consulting

GDPR Toolkit Basic

"DSGVO-BASIS for your CRM System "Dynamics 365"

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DSGVO Toolkit Basic in Detail

Functional Overview

Comply with the DSGVO requirements!

At the contact is the storage of processing purposes, declaration of consent, origin and related expiration date enabled to comply with legal requirements.

Information Report

Article 15 - Right of access by the data subject

At the push of a button a PDF document can be created which shows all data of a contact and its origin. Furthermore the report shows to which internal & external places the data was passed on. So you are able to provide information in case of need..

Data Transmission

Article 20 - Right to data portability

With a standardized export the personal data can be exported.

Deletion & Anonymization engine

Article 17 - Right to erasure ('right to be forgotten')

If, according to the processing purpose, the associated expiration date has been reached and there is no declaration of consent in the system that sets a different expiration date, the contact is automatically deleted or anonymized by the system.

Restriction of processing

Article 18 - Right to restrict the processing

By adjusting the processing purpose of the contact, the wish of the stored person can be met. The system documents that the data will only be used for purposes with appropriate consent.

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DSGVO Toolkit Basic in Detail

Implementation & Customization

1.0 Preparation

1.1 Preparation of a list of processing purposes
1.2 Allocation of deletion periods for the purposes
1.3 Preparation of declarations of consent for data sources & purposes
1.4 Data-In analysis (which data is entered into the system and how)
1.5 Analysis Data-Out (which data comes where from the system)
1.6 Creating a Data-In / Data-Out Map

These points are made in cooperation with the customer's data protection officer.

2.0 Define adjustments

2.1 Define workflows that store the consent forms on the contact
2.2 Define workflows to set the data-in sources and save connected consent forms.
2.3 Define workflows to set data-out targets.

3.0 Implementation & Customization

3.1 Importing the DSGVO Managed Solution
3.2 Import of Processing Purposes & Deletion Periods
3.3 Import of Declarations of Consent for Data Sources & Purposes
3.4 Create workflows that store the consent forms on the contact
3.5 Create workflows to set the data-in sources and save connected consent forms.
3.6 Create workflows to set the data-out targets.
3.7 Activating the Delete Engine
3.8 Incorporation of the DSGVO area into the contact form.

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4.0 Testing

4.1 Functional test of the functions with the CRM project team
4.2 Functional review with the customer's data protection officer
4.3 Instruction of the key users in the use of the Solution

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