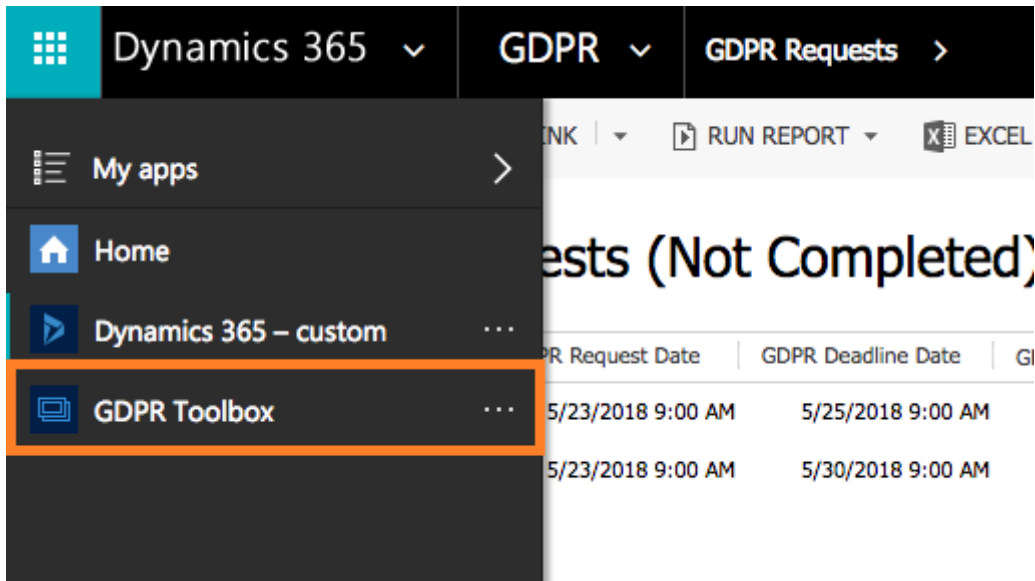


GDPR Toolbox: User Guide

To make the best out of our GDPR Toolbox, please follow this user guide.

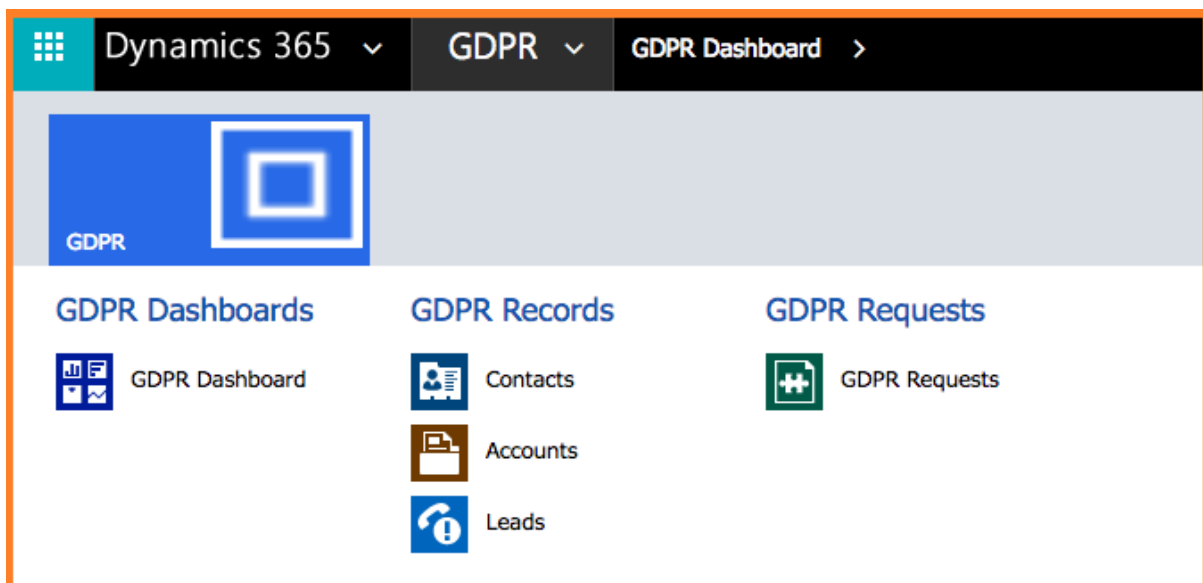
Navigation

Once the GDPR tool box is imported in your Dynamics environment, can find the GDPR Toolbox in the list of your dynamics applications. Simply click on the “GDPR Toolbox” tile.



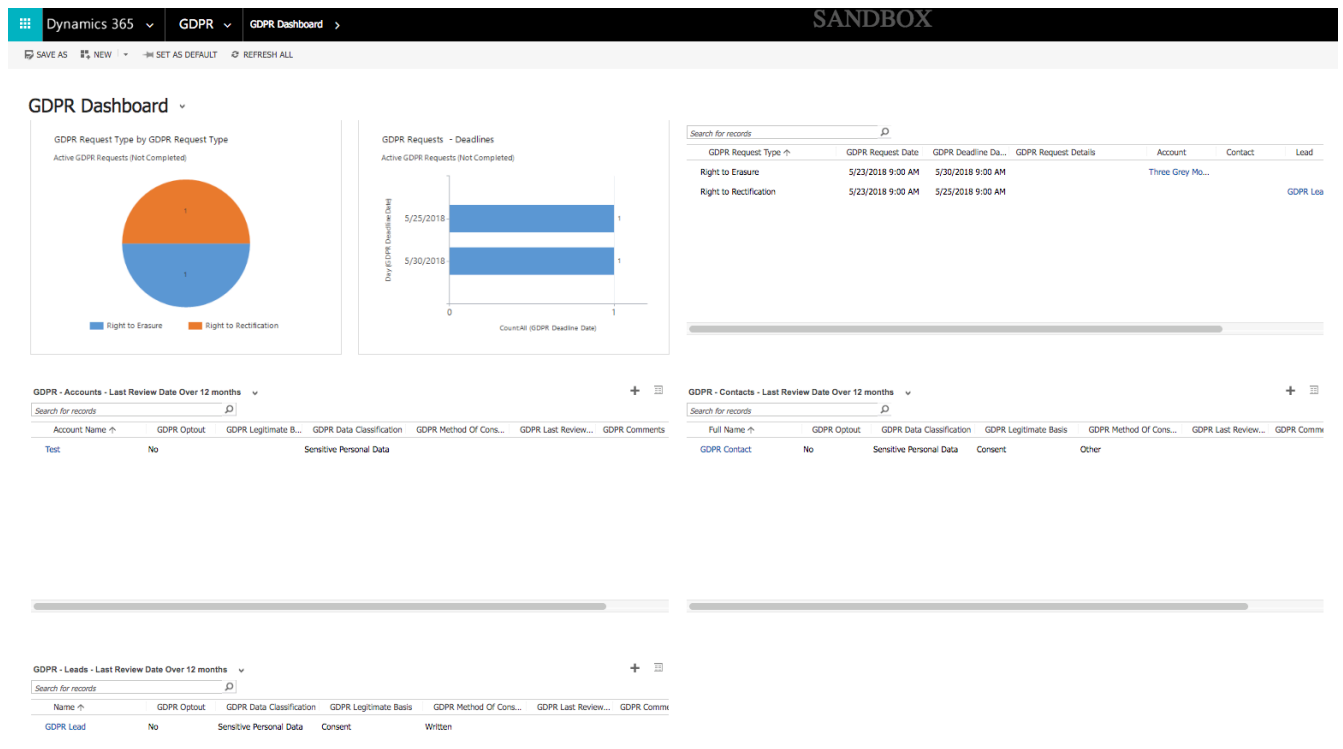
This will open the GDPR Toolbox site map. Here you can navigate to the following options:

- GDPR Dashboard
- GDPR Records
- GDPR Requests



GDPR Dashboard

The dashboard will display charts and a variety of views. This can give you a great overview of where your data stands and where it needs to be according to the GDPR compliance.



GDPR Records

In this section you can view all your Contacts, Accounts and Leads records. You can add and edit a record here and fill in GDPR details for it. These GDPR Details include:

- **GDPR Optout**
Select: Yes or No
- **Data Classification**
Select: Personal Data or Sensitive Personal Data
- **Legitimate Basis**
 - (a) **Consent:** the individual has given clear consent for you to process their personal data for a specific purpose.
 - (b) **Contract:** the processing is necessary for a contract you have with the individual, or because they have asked you to take specific steps before entering into a contract.
 - (c) **Legal obligation:** the processing is necessary for you to comply with the law (not including contractual obligations).
 - (d) **Vital interests:** the processing is necessary to protect someone's life.
 - (e) **Public task:** the processing is necessary for you to perform a task in the public interest or for your official functions, and the task or function has a clear basis in law.

(f) **Legitimate interests:** the processing is necessary for your legitimate interests or the legitimate interests of a third party unless there is a good reason to protect the individual's personal data which overrides those legitimate interests.

- **Last Review Date**
Select the date when this record was last reviewed.
- **Comments**
Just additional space to add comments related to the selected record.

All these fields are necessary to have a GDPR compliant record of a data subject.

At the bottom of the panel you can see all the resolved and unresolved GDPR requests for the data subject.

Contacts

CONTACT
GDPR Contact

This contact contains Special Category Data by GDPR. Please ensure that you meet the conditions listed in Article 9(2) of the GDPR guidelines.

General Data Protection Regulations (GDPR)

GDPR Details	
GDPR Optout ⁺ No	GDPR Last Review Date --
GDPR Data Classification ⁺ Sensitive Personal Data	GDPR Comments --
GDPR Legitimate Basis ⁺ Consent	
GDPR Method Of Consent Other	

GDPR Requests

GDPR Request Type ↑	GDPR Request D...	GDPR Deadline D...	GDPR Request Details	Account	Contact	Lead	Created On
No GDPR Request records found.							

Accounts

Dynamics 365 | GDPR | Accounts > Three Grey Monkeys > **SANDBOX**

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

ACCOUNT
Three Grey Monkeys

Annual Revenue: -- | No. of Employ...: -- | Owner: **GDPR 82**

This contact contains Special Category Data by GDPR. Please ensure that you meet the conditions listed in Article 9(2) of the GDPR guidelines.

General Data Protection Regulations (GDPR)

GDPR Details

GDPR Optout ⁺ No	GDPR Last Review Date 5/23/2018
GDPR Data Classification ⁺ Sensitive Personal Data	GDPR Comments --
GDPR Legitimate Basis ⁺ Public Task	

GDPR Requests

GDPR Request Type ↑	GDPR Request D...	GDPR Deadline D...	GDPR Request Details	Account	Contact	Lead	Created On
No GDPR Request records found.							

Leads

Dynamics 365 | GDPR | Leads > GDPR Lead > **SANDBOX**

NEW | DELETE | QUALIFY | PROCESS | DISQUALIFY | ADD TO MARKETING LIST | ASSIGN | SHARE | EMAIL A LINK

LEAD
GDPR Lead

Lead Source: -- | Rating: Warm | Status: New | Owner: **GDPR 82**

Qualify (Active for 3 hours) | Develop | Propose | Close

Existing Contact? click to enter	Estimated Budget click to enter	Capture Summary click to enter
Existing Account? click to enter	Purchase Process click to enter	
Purchase Timeframe click to enter	Identify Decision Maker mark complete	

Lead to Opportunity Sales Process (Active for 3 hours) **Next Stage** ↑

General Data Protection Regulations (GDPR)

GDPR Details

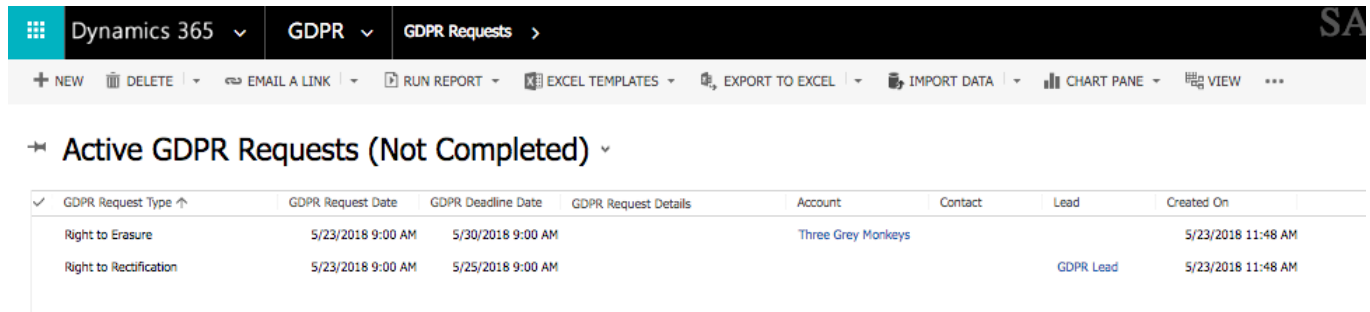
GDPR Optout ⁺ No	GDPR Last Review Date --
GDPR Data Classification ⁺ Personal Data	GDPR Comments --
GDPR Legitimate Basis ⁺ Consent	
GDPR Method Of Consent Written	

GDPR Requests

GDPR Request Type ↑	GDPR Request D...	GDPR Deadline D...	GDPR Request Details	Account	Contact	Lead	Created On
Right to Rectification	5/23/2018 9:00 AM	5/25/2018 9:00 AM				GDPR Lead	5/23/2018 11:48 AM


GDPR Requests

This section views all the GDPR requests that have been documented. You change the view table to show the Completed and Not Completed requests.



The screenshot shows the Dynamics 365 interface for GDPR Requests. The top navigation bar includes 'Dynamics 365', 'GDPR', and 'GDPR Requests'. Below the navigation bar is a toolbar with options: '+ NEW', 'DELETE', 'EMAIL A LINK', 'RUN REPORT', 'EXCEL TEMPLATES', 'EXPORT TO EXCEL', 'IMPORT DATA', 'CHART PANE', 'VIEW', and '...'. The main content area shows a table titled 'Active GDPR Requests (Not Completed)'. The table has columns for 'GDPR Request Type', 'GDPR Request Date', 'GDPR Deadline Date', 'GDPR Request Details', 'Account', 'Contact', 'Lead', and 'Created On'. Two rows are visible: one for 'Right to Erasure' and one for 'Right to Rectification'.

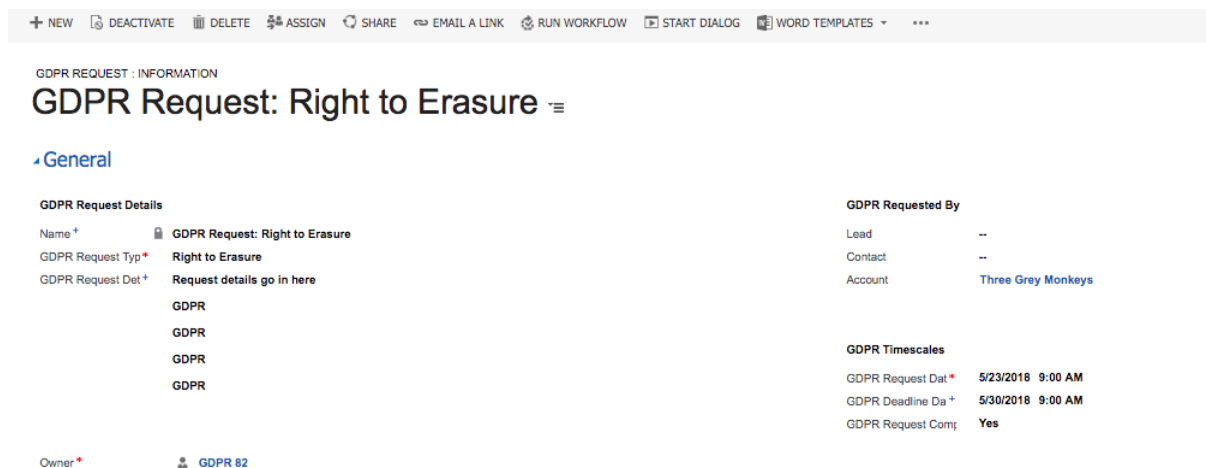
GDPR Request Type	GDPR Request Date	GDPR Deadline Date	GDPR Request Details	Account	Contact	Lead	Created On
Right to Erasure	5/23/2018 9:00 AM	5/30/2018 9:00 AM		Three Grey Monkeys			5/23/2018 11:48 AM
Right to Rectification	5/23/2018 9:00 AM	5/25/2018 9:00 AM				GDPR Lead	5/23/2018 11:48 AM

You can add a request by selecting the  option in the tools bar.

GDPR allows data subject to make following requests from the data processing organisation:

- Right to be Informed
- Right to Access data
- Right to Rectification
- Right to Ensure
- Right to Restrict Processing
- Right to Data Portability
- Right to Object
- Rights related to automated decision making including profiling

All these requests can be selected from the “Request Type” option. Details regarding a request can be filled out in notes under the “Request Details” along with other necessary information such as “Requested By” and “Timescales” options.



The screenshot shows the Dynamics 365 form for a GDPR Request: Right to Erasure. The form is titled 'GDPR Request: Right to Erasure' and is categorized under 'GDPR Request: INFORMATION'. The form is divided into several sections: 'General', 'GDPR Request Details', 'GDPR Requested By', and 'GDPR Timescales'. The 'GDPR Request Details' section includes fields for Name, Type, and Details. The 'GDPR Requested By' section includes fields for Lead, Contact, and Account. The 'GDPR Timescales' section includes fields for Request Date, Deadline Date, and Request Completed.

GDPR Request Details		GDPR Requested By		GDPR Timescales	
Name	GDPR Request: Right to Erasure	Lead	--	GDPR Request Date	5/23/2018 9:00 AM
GDPR Request Type	Right to Erasure	Contact	--	GDPR Deadline Date	5/30/2018 9:00 AM
GDPR Request Details	Request details go in here	Account	Three Grey Monkeys	GDPR Request Completed	Yes
	GDPR				
	GDPR				
	GDPR				
	GDPR				
Owner	GDPR 82				