



Ensure your Microsoft Dynamics CRM system is GDPR compliant

Microsoft | Dynamics 365

If you are responsible for meeting your organisation's GDPR compliance, you will recognise these concerns:

"I'm responsible for our CRM system, but I'm not sure of my GDPR obligations."

"We've been approached by many so-called GDPR experts but no-one has CRM"

"We need an easy to use interface that can handle GDPR."

Why choose Prodware to meet your GDPR obligations in Dynamics CRM (Dynamics 365)?

As a Microsoft partner, Prodware has developed and implemented GDPR compliance projects specifically for Microsoft Dynamics across Europe.

Our clients can opt for an easy to use yet robust add-on for their Dynamics CRM system (CEM GDPR accelerator) or they can take our complete package, which includes the add-on solution plus services and supporting documentation to ensure that you are fully compliant.



Solution



Documentation

- Compliance guide
- Analysis results
- (CRM) Marketing guidelines



Services

- Dynamics configuration
- Technical analysis



The CEM GDPR accelerator

- Simplifies compliance with privacy requests from data subjects
- Easy to use interface for CRM operators
- Logs all operations to comply with record-keeping requirements
- Out of the box for Dynamics CRM 2015 versions onwards



Rapid and easy installation

An out-of-the box solution delivered for a quick start:

- Specific range
- Preconfigured solution
- User manual



Easy search

Search mechanism for keywords across the system and a preconfigured Search Results report enables rectification and export of data.



Register and log all GDPR actions

The CEM GDPR accelerator will allow users to configure fields and entities that contain personal data, delete upon customer requests and export to Excel, Word and other common formats.



Full audit trail

Audit trail mechanism follows modifications in sensitive data.

A brief refresher of GDPR

-  Current EU personal data protection regulation
-  Attempts to give back control of personal data to citizens
-  Very strict regarding consent, legal base for processing
-  Expands personal rights; adds new obligations for companies
-  Limits data transfers outside EU and retention time
-  Huge penalties for infractions – much higher than existing ones

How can Prodware's GDPR compliance package assist?

- Access control
- Audit & notification
- Geographical restrictions
- Identify personal data
- Legal basis
- Privacy policy
- Process recording
- Right of access
- Right of rectification
- Right to data portability
- Right to erasure
- Right to limitation of processing
- Security

Your primary obligations as a CRM system owner



Legality

- You must make sure you have a **legal basis** for treatment, and perform only treatments supported by that basis.
- More often than not, the legal basis for CRM data will be **consent**. This consent must be GDPR-compliant and must be properly recorded and **demonstrable**.
- You must make sure your **privacy policy** and other legal texts are adapted to the new law and properly communicated.



Privacy

- You must follow the principle of **data minimization** and use as little personal data as possible in each case.
- You must establish a channel for subjects to perform **privacy requests** and **execute those requests** in a timely manner.



Security

- You must **protect** personal data with adequate security measures.
- You must respect **restrictions regarding the geographical transfer** of data

Speak to Prodware about getting your CRM compliant with GDPR in three easy steps – with the add-on solution, documentation and services.



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