

# GDPR TOOLS

## USER GUIDE

Latest Version

16/6/2025

# Table of Contents

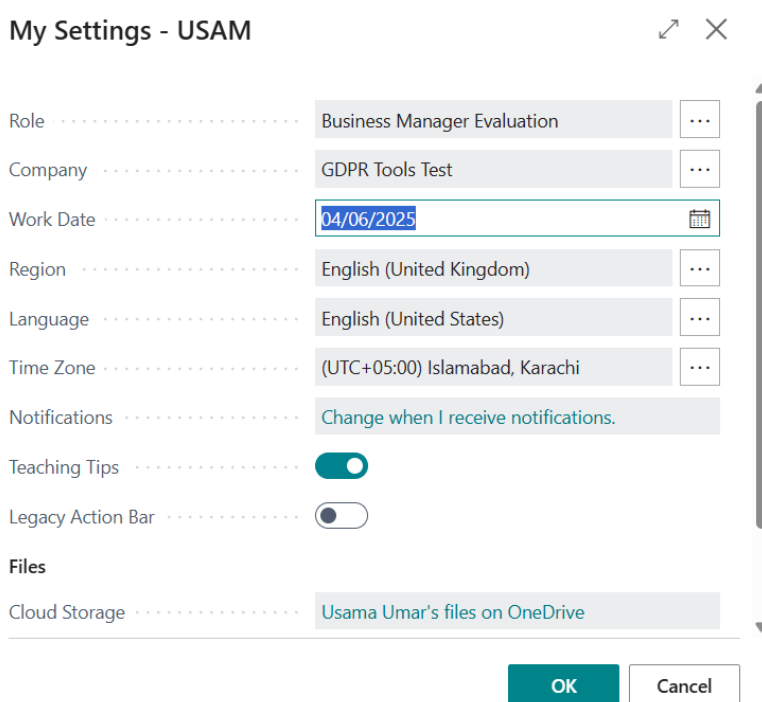
<b>1 INTRODUCTION .....</b>	<b>3</b>
<b>2 BLOCK CUSTOMER/VENDOR .....</b>	<b>4</b>
2.1 EXPORT.....	5
2.2 BLOCK .....	6
2.3 EXPORT AND BLOCK.....	8
<b>3 ANONYMIZATION TOOL .....</b>	<b>8</b>
3.1 WORTH NOTING .....	8
3.2 ANONYMIZATION SETUP .....	9
<b>3.2.1 Customer</b> .....	10
<b>3.2.2 Vendor</b> .....	11
3.3 ANONYMIZATION PROCESS.....	13
<b>3.3.1 Simulation Mode</b> .....	14
<b>3.3.2 Anonymization Mode</b> .....	16
3.4 SIMULATION REPORT .....	20
3.5 SIMULTION ENTERIES .....	21
3.6 LOGS .....	22
3.7 HOW SHOULD 5 AND 10 YEARS BE UNDERSTOOD? .....	23

# 1 INTRODUCTION

GDPR Tools by MDC Nordic is a solution designed for Microsoft Dynamics 365 Business Central, is designed to assist organizations in meeting data privacy and retention requirements under the General Data Protection Regulation (GDPR). The app provides functionality to **anonymize** and **block inactive Customers and Vendors**, helping businesses manage personal data responsibly and stay compliant.

With features like automatic identification of outdated records, detailed reporting for audit purposes, and flexible settings for anonymization and blocking based on user-defined timeframes, the GDPR Tools app ensures that sensitive data is handled efficiently and securely without disrupting operational integrity.

After installation GDPR Tools App from AppSource, user can access GDPR Tools app by selecting **Business Manager** or **Business Evaluation Manager** on Role.



**My Settings - USAM** ↗ ✕

Role	Business Manager Evaluation	...
Company	GDPR Tools Test	...
Work Date	04/06/2025	📅
Region	English (United Kingdom)	...
Language	English (United States)	...
Time Zone	(UTC+05:00) Islamabad, Karachi	...
Notifications	Change when I receive notifications.	
Teaching Tips	<input checked="" type="checkbox"/>	
Legacy Action Bar	<input type="checkbox"/>	
<b>Files</b>		
Cloud Storage	Usama Umar's files on OneDrive	

**OK** **Cancel**

There are 2 different functionalities in the app.

- Block Customer/Vendor Setup
- Anonymization Setup

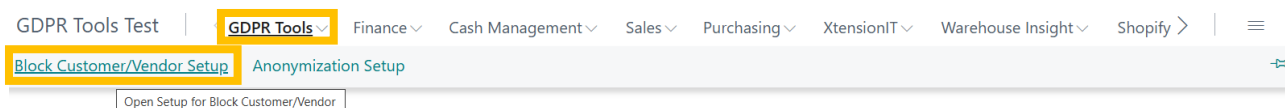
## 2 Block Customer/Vendor

The **Block Customer/Vendor** functionality allows users to block Customers and Vendors who have been inactive since a specified period. This helps in maintaining clean and compliant master data.

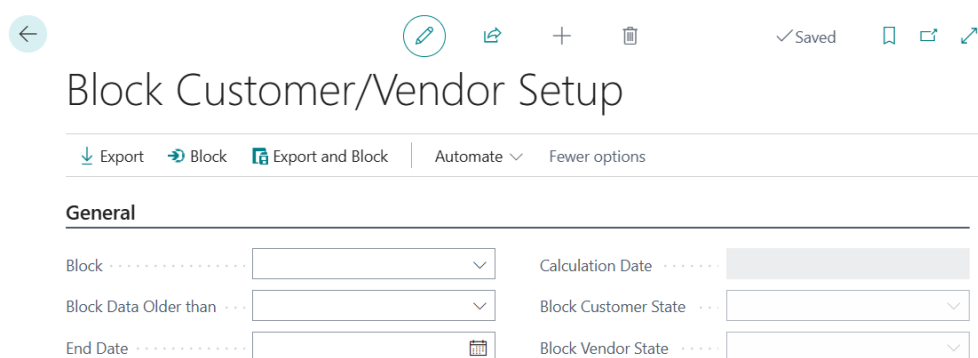
Users have the option to:

- **Directly block** the inactive Customers and Vendors based on the defined filters and time range.
- **Preview** the list of records that will be blocked by exporting the data to an Excel file.

User can access **Block Customer/Vendor Setup** on Role Center page in **GDPR Tools** section.



The setup for Block Customer/Vendor will be opened.



**Block:** Specifies the type of entity to block. The user can choose to block **Customers**, **Vendors**, or **Both** based on the selected option.

**Block Data Older than:** Defines the number of years used to determine which records are considered outdated. This value helps calculate the cutoff date for identifying Customers or Vendors with no recent activity.

**End Date:** Represents the reference date used in combination with *Block Data Older Than* to calculate the *Calculation Date*. Typically, this is the date up to which data is evaluated.

**Calculation Date:** This is the derived date calculated using the *End Date* minus the number of years specified in *Block Data Older Than*. Records with no activity since this date will be considered for blocking.

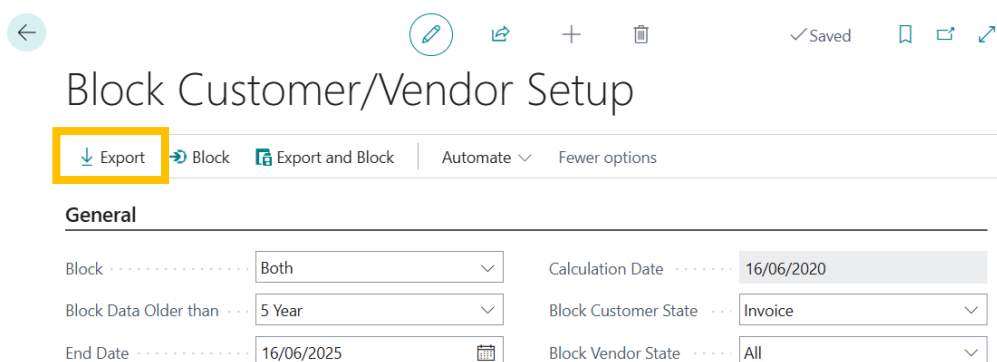
**Block Customer State:** Defines the status that will be applied to Customers identified for blocking. This ensures that these records are marked accordingly within the system.

**Block Vendor State:** Defines the status that will be applied to Vendors identified for blocking, helping maintain consistent data handling and compliance.

## 2.1 Export

Users can preview the list of **Customers and Vendors** that are eligible for blocking by exporting the data to an Excel file.

To export the list, click the **Export** action.




Block Customer/Vendor Setup

[Export](#)
[Block](#)
[Export and Block](#)
Automate
Fewer options

**General**

Block	Both	Calculation Date	16/06/2020
Block Data Older than	5 Year	Block Customer State	Invoice
End Date	16/06/2025	Block Vendor State	All


If any **Customers or Vendors** match the applied filters (based on the blocking criteria), an Excel file will be downloaded containing the relevant data.

 The requested operation has been done successfully

OK

The exported file includes detailed information about each Customer or Vendor identified for blocking.

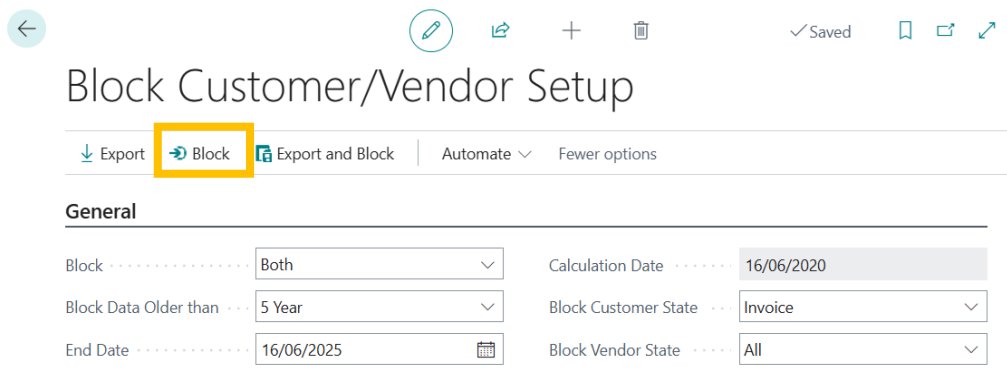
If **no records** meet the criteria, a message will be displayed indicating that there are no Customers or Vendors to block.

 There is nothing to post

OK

## 2.2 Block

The **Block** action allows users to directly block Customers and Vendors without exporting or reviewing the data in a file.



Block Customer/Vendor Setup

Export Block Export and Block Automate Fewer options

**General**

Block ..... Both

Calculation Date ..... 16/06/2020


Block Data Older than ..... 5 Year

Block Customer State ..... Invoice

End Date ..... 16/06/2025

Block Vendor State ..... All


When the user clicks **Block**, a **confirmation dialog** will appear to ensure the action is intentional.

 This will block Customer/Vendor based on the selection. Do you want to continue?

Yes No

Upon confirmation, all Customers and Vendors matching the specified filters and criteria will be updated with the selected block state. This action is irreversible through the tool and should be used with caution, as it modifies the status of the records directly.

If any **Customers or Vendors** match the applied filters (based on the blocking criteria), the customer/vendor will be **blocked**.

 The requested operation has been done successfully

OK

## 2.3 Export and Block

This action performs two operations simultaneously:

1. **Exports** the data of Customers and Vendors that match the specified filters.
2. **Blocks** those Customers and Vendors by updating their status to the new state defined by the user.

This allows users to both retain a copy of affected records for reference and apply the necessary block updates in a single step.

## 3 Anonymization Tool

### 3.1 Worth Noting

According to the Accounting Act, data must no longer be stored when they are more than 5 years old.

However, if you have special EU projects, this rule does not apply. There may be rules that they must be stored for up to 10 years or more.

If you have EU projects, then it is VERY important that you NEVER run a full run on the anonymization.

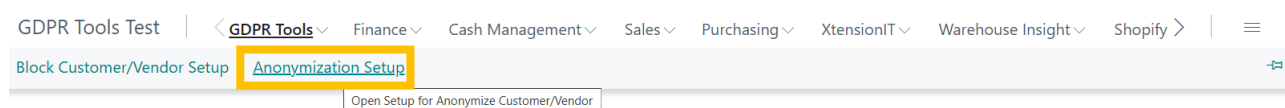
If you have EU projects, you must use the filtering option and filter out the customer/vendor that must be stored for more than 5 years, or if it is controlled via Dimensions, use the option to exclude certain dimension values in the run.

If data is not ACTIVELY sorted out, it will be anonymized together with the other debtors/creditors. And it will not be possible to reverse it unless there is a new back-up.

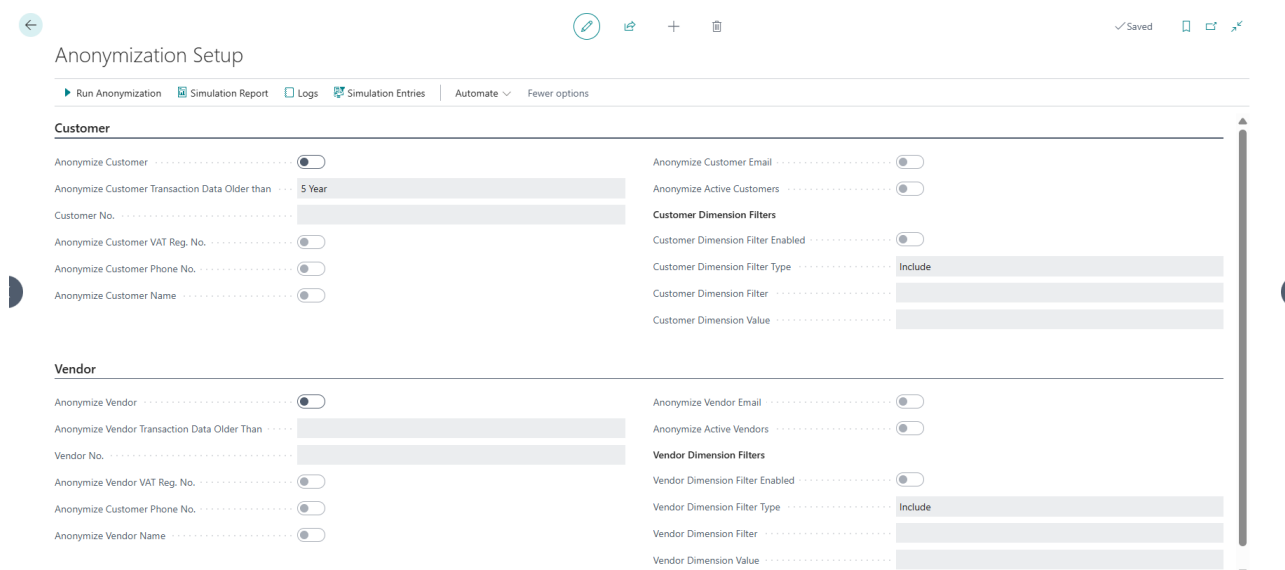
## 3.2 Anonymization Setup

The Anonymization Setup allow users to anonymize customers and vendors according to the choice. It is important that all items in the account are settled, so that there are no open entries that otherwise fall under the criterion older than 5 or 10 years. If there are open records, anonymization cannot be made.

To start **Anonymization**, user needs to open the **Anonymization Setup** from **Business Manager** or **Business Evaluation Manager** Role Center.



The Anonymization Setup will be opened.



There are two panels, "**Customer**" and "**Vendor**".

Please note that it is ONLY possible to run one of them at a time.

The following is the description of fields:

### 3.2.1 Customer

**Anonymize Customer:** It is necessary to enable this option to start anonymization of customers.

**Anonymize Customer Transaction Data Older than:** Specifies the number of years used to determine which customer transaction data should be anonymized. Transactions older than the calculated date will be considered for anonymization based on this value. This helps ensure that only outdated data is processed, in line with data retention policies.

**Customer No.:** User can specify the Customer No. to anonymize. It is not possible to add multiple customers. If the field is empty, all customers will be selected. If the records on the selected customer do not live up to the selection in " **Anonymize Customer Transaction Data Older than** ", then the data will NOT be anonymized - but will remain untouched.

**Anonymize Customer VAT Reg. No.:** Enable this option to anonymize the VAT Registration Number of the customer during the anonymization process.

**Anonymize Customer Phone No.:** Enable this option to anonymize the Phone Number of the customer during the anonymization process.

**Anonymize Customer Name:** Enable this option to anonymize the Name of the customer during the anonymization process.

**Anonymize Customer Email:** Enable this option to anonymize the Email of the customer during the anonymization process.

**Anonymize Active Customers:** Enable this option to have data older than 5 years anonymized on active customers. The run will ONLY anonymize records that are older than 5 or 10 years.

## Customer Dimension filters

If you have customers, also active customers, who have transactions older than 5 years or 10 years, with dimensions, and where items with these dimensions and dimension values must be retained, you can choose to insert dimension filter "exclude", with the dimension/value you want to exclude, and thereby exempt these items from being anonymized.

If you use Dimension Filter, and there is an entry on the customer or vendor that is older than 5 or 10 that cannot/should not be anonymized, because it is part of an EU project, then no records on the customer or vendor in question will be anonymized.

**Customer Dimension Filter Enabled:** Enable this field to include the Dimension Filters during Anonymization.

**Customer Dimension Filter Type:** Select **include** to include the Dimension Filter and Dimension Value while anonymization and, select **exclude** to exclude the Dimension Filter and Dimension Value while anonymization.

**Customer Dimension Filter:** Select Dimension filters to include or exclude during anonymization based on the selection.

**Customer Dimension Value:** Select Dimension value of the selected Dimension Filter to include or exclude during anonymization based on the selection.

### 3.2.2 Vendor

**Anonymize Vendor:** It is necessary to enable this option to start anonymization of vendors.

**Anonymize Vendor Transaction Data Older than:** Specifies the number of years used to determine which vendor transaction data should be anonymized. Transactions older than the calculated date will be considered for anonymization based on this value. This helps ensure that only outdated data is processed, in line with data retention policies.

**Vendor No.:** User can specify the Vendor No. to anonymize. It is not possible to add multiple vendors. If the field is empty, all vendors will be selected.

If the records on the selected vendor do not live up to the selection in " **Anonymize Vendor Transaction Data Older than** ", then the data will NOT be anonymized - but will remain untouched.

**Anonymize Vendor VAT Reg. No.:** Enable this option to anonymize the VAT Registration Number of the vendor during the anonymization process.

**Anonymize Vendor Phone No.:** Enable this option to anonymize the Phone Number of the vendor during the anonymization process.

**Anonymize Vendor Name:** Enable this option to anonymize the Name of the vendor during the anonymization process.

**Anonymize Vendor Email:** Enable this option to anonymize the Email of the vendor during the anonymization process.

**Anonymize Active Vendors:** Enable this option to have data older than 5 years anonymized on active vendors. The run will ONLY anonymize records that are older than 5 or 10 years.

### **Vendor Dimension filters**

If you have vendors, also active vendors, who have transactions older than 5 years or 10 years, with dimensions, and where items with these dimensions and dimension values must be retained, you can choose to insert dimension filter "exclude", with the dimension/value you want to exclude, and thereby exempt these items from being anonymized.

If you use Dimension Filter, and there is an entry on the vendor that is older than 5 or 10 that cannot/should not be anonymized, because it is part of an EU project, then no records on the vendor in question will be anonymized.

**Vendor Dimension Filter Enabled:** Enable this field to include the Dimension Filters during Anonymization.

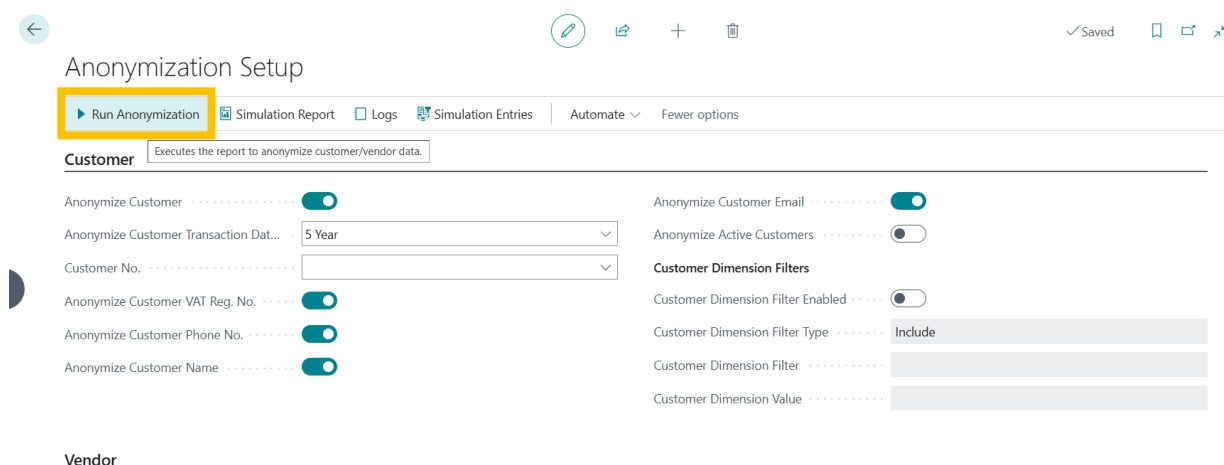
**Vendor Dimension Filter Type:** Select **include** to include the Dimension Filter and Dimension Value while anonymization and, select **exclude** to exclude the Dimension Filter and Dimension Value while anonymization.

**Vendor Dimension Filter:** Select Dimension filters to include or exclude during anonymization based on the selection.

**Vendor Dimension Value:** Select Dimension value of the selected Dimension Filter to include or exclude during anonymization based on the selection.

### 3.3 Anonymization Process

After completing the setup, select **Run Anonymization** on the setup page.



A wizard will open.

## Run Anonymization



### Run Simulation

A simulation run must be performed to show the consequences of the anonymization before it can be executed.

If the most recent simulation run is older than 3 days from today, it must be run again.

Note that if the setup in the current run has been changed compared to the previous run, a new simulation run must be performed.

Check the box below to run a new simulation run or click next to proceed to the next step.

Simulation Mode .....

Finish

Back

Next

### 3.3.1 Simulation Mode


Enable the **Simulation Mode** to run the new Simulation.

After the **Simulation Mode** button is enabled, the "**Finish**" button will be activated.


It is very important that you make sure to enable "**Simulation Mode**" at the first execution.

Press **Finish** to run simulation.

A dialog box will now appear, with information about what action is being implemented. By default, it is marked "No", it is very important that you read the message before choosing to click "Yes or No".

 This run generates simulation records that show which tables and fields will be affected if the anonymization process is executed with the selected configuration. No data will be altered during this run.  
Are you sure you want to start the simulation run?

By pressing **Yes**, the simulation will run. After completion of simulation, a dialog will appear if there is any data in simulation entries.

 The Simulation has been completed successfully, Do you want to preview the anonymization report?

If user selects **Yes**, the simulation report will be downloaded. Otherwise, it will exit. However, user can view report inside Business Central by running report.

### 3.3.2 Anonymization Mode

If user doesn't enable **Simulation Mode** and select **Next**.

#### Run Anonymization



##### Run Simulation

A simulation run must be performed to show the consequences of the anonymization before it can be executed.

If the most recent simulation run is older than 3 days from today, it must be run again.

Note that if the setup in the current run has been changed compared to the previous run, a new simulation run must be performed.

Check the box below to run a new simulation run or click next to proceed to the next step.

Simulation Mode

Finish

Back

Next

The wizard will ask for the confirmation. This step is necessary for that user should be aware of the data that is to be anonymized.

## Run Anonymization



### Simulation Report

Print and save the simulation report. Note that the simulation report cannot be restored once the anonymization run is completed.

You can only proceed to the next step after confirming that the simulation report has been printed and saved.

Simulation report has been prin...

Finish

Back

Next

If user confirms that the Simulation Report has been printed, then user can move forward.

## Run Anonymization



### Confirm database backup

It is always recommended that a backup is taken before the anonymization is initiated.

Confirm backup to continue next step.

Confirm Backup .....

Finish

Back

Next

If user confirms regarding the backup, user can move to next step.

If user has specified any specific customer for anonymization, then user will see the following step.

## Run Anonymization ↗ ✕

### Customer Anonymization

You have chosen to run Customer anonymization with the filters.

Customer Filters ..... 30000 ▼

In limited Customer anonymization, only master data, Customer records, and posted sales documents (Sale Invoices, Credit Memos, Reminders, and Interest Notes) within the specified filter will be anonymized.

Only financial records derived from a sales document will be anonymized.

Select finish to execute the anonymization.

*Note that this run cannot be undone.*

---

Finish
Back
Next

If user hasn't specified any specific customer or vendor, then user will see the following step.

## Run Anonymization



### Customer Anonymization

You have chosen to run a full Customer anonymization. This run cannot be undone.

Select finish to execute the anonymization.

*Note that this run cannot be undone.*





This is final confirmation before **anonymization**. If user wants to continue, click on **Finish**. A dialog will appear for confirmation. Press **Yes** to anonymize.



Are you sure you want to initiate the anonymization process?  
Please note that this action cannot be undone.




The anonymization will start. If the data falls under the criteria, the data will be **Anonymized**.

 The anonymization has been done successfully

OK

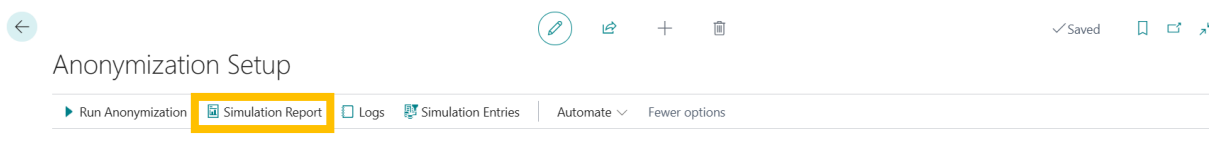
If the criteria doesn't match, user will get following message.

 There is nothing to anonymize under this setup configuration

OK

### 3.4 Simulation Report

User can view the simulation report inside Business Central by selecting **Simulation Report** on setup page.



A request page will appear where user can enter filters.

## Simulation Entries



Printer ..... (Handled by the browser) ▾

Report Layout ..... src/Reports/Layouts/SimulationEnteries.rdl ...

### Filter: Simulation Entry

× Date and Time .....

+ Filter...

### Advanced >

Select **Preview & Close**.

## Simulation Report

GDPR Tools Test

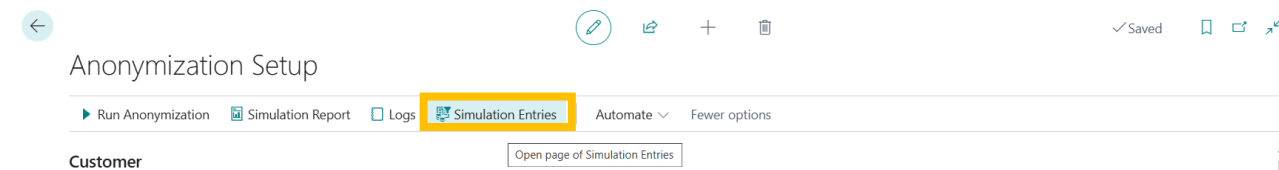
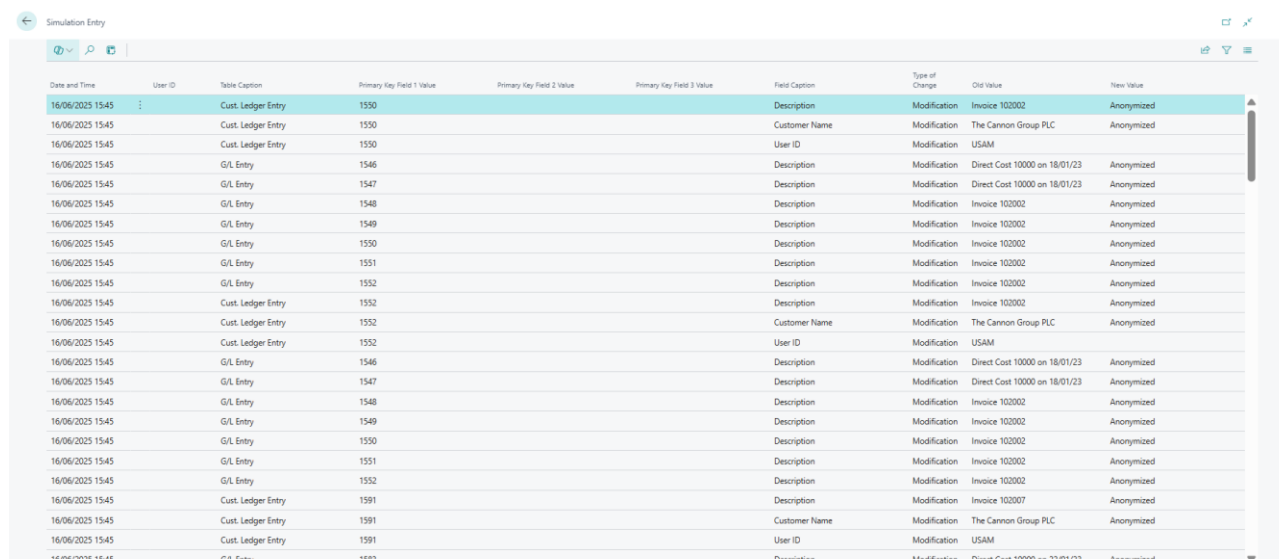
Generated At 16 June 2025  
 Generated By USAM  
 Anonymizing Data Til 30/12/2026 00:00:00  
 Page 1 of 27

Table Caption	Primary Key	Field Caption	Old Value	New Value
Cust. Ledger Entry	Entry No.=1550	Description	Invoice 102002	Anonymized
Cust. Ledger Entry	Entry No.=1550	Customer Name	The Cannon Group PLC	Anonymized
Cust. Ledger Entry	Entry No.=1550	User ID	USAM	
G/L Entry	Entry No.=1546	Description	Direct Cost 10000 on 18/01/23	Anonymized
G/L Entry	Entry No.=1547	Description	Direct Cost 10000 on 18/01/23	Anonymized
G/L Entry	Entry No.=1548	Description	Invoice 102002	Anonymized
G/L Entry	Entry No.=1549	Description	Invoice 102002	Anonymized
G/L Entry	Entry No.=1550	Description	Invoice 102002	Anonymized
G/L Entry	Entry No.=1551	Description	Invoice 102002	Anonymized
G/L Entry	Entry No.=1552	Description	Invoice 102002	Anonymized
Cust. Ledger Entry	Entry No.=1552	Description	Invoice 102002	Anonymized
Cust. Ledger Entry	Entry No.=1552	Customer Name	The Cannon Group PLC	Anonymized
Cust. Ledger Entry	Entry No.=1552	User ID	USAM	
G/L Entry	Entry No.=1546	Description	Direct Cost 10000 on 18/01/23	Anonymized

## 3.5 Simulation Entries

User can view the Simulation Entries.

Click on **Simulation Entries** on the setup page.

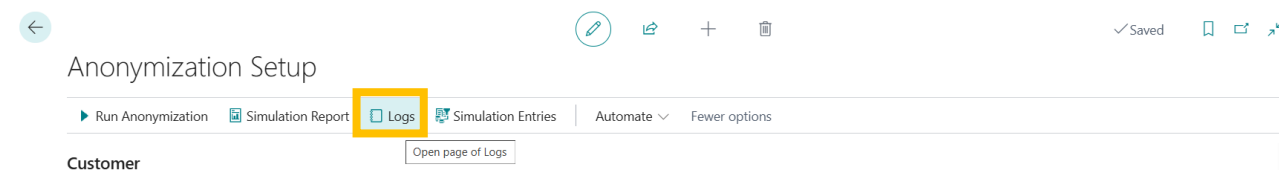



Date and Time	User ID	Table Caption	Primary Key Field 1 Value	Primary Key Field 2 Value	Primary Key Field 3 Value	Field Caption	Type of Change	Old Value	New Value
16/06/2025 15:45		Cust. Ledger Entry	1550			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1550			Customer Name	Modification	The Cannon Group PLC	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1550			User ID	Modification	USAM	Anonymized
16/06/2025 15:45		G/L Entry	1546			Description	Modification	Direct Cost 10000 on 18/01/23	Anonymized
16/06/2025 15:45		G/L Entry	1547			Description	Modification	Direct Cost 10000 on 18/01/23	Anonymized
16/06/2025 15:45		G/L Entry	1548			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1549			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1550			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1551			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1552			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1552			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1552			Customer Name	Modification	The Cannon Group PLC	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1552			User ID	Modification	USAM	Anonymized
16/06/2025 15:45		G/L Entry	1546			Description	Modification	Direct Cost 10000 on 18/01/23	Anonymized
16/06/2025 15:45		G/L Entry	1547			Description	Modification	Direct Cost 10000 on 18/01/23	Anonymized
16/06/2025 15:45		G/L Entry	1548			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1549			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1550			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1551			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		G/L Entry	1552			Description	Modification	Invoice 102002	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1591			Description	Modification	Invoice 102007	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1591			Customer Name	Modification	The Cannon Group PLC	Anonymized
16/06/2025 15:45		Cust. Ledger Entry	1591			User ID	Modification	USAM	Anonymized
16/06/2025 15:45		G/L Entry	1583			Description	Modification	Direct Cost 10000 on 22/01/23	Anonymized

### 3.6 Logs

User can view the logs for the Anonymization.

Click on **Logs** to view logs.



← Anonymization Logs 📄 ↗

🔍 📄 | Manage 📄 🔍 ☰

Entry No. ↑	Time of Completion	Time of execution	Total duration of execution	Executed by (User name)	Executed by (Full name)	Sim... Mode
1	02/06/2025 11:06	02/06/2025 11:05	4 seconds 898...	USAM	Usama Umar	<input checked="" type="checkbox"/>
2	16/06/2025 15:45	16/06/2025 15:45	4 seconds 836...	USAM	Usama Umar	<input checked="" type="checkbox"/>

### 3.7 How should 5 and 10 years be understood?

Example: You have a customer who on 18/5-21 has entries that are more than 5 years old, as the latest entry has a posting date of 16/5-16. This debtor will not be included in the anonymization run, as it is within the financial year 2016.

In 2021, anonymization will be applied to debtors/creditors who have items where the last posting date is 31/12-15. In 2022, it will anonymize where the last posting date is 31/12-16, etc. It is therefore the entire financial year that is counted on and not on dates.

The end date of anonymization is the latest completed financial year. From this, 5 or 10 years are deducted, provided that there are no items that are newer.