

## . Service name

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TRUSTMARQUE MICROSOFT DYNAMICS 365 PRODUCT SET

## . About your service

### Service description

The Microsoft Dynamics 365 product sets (see Pricing) from Microsoft Partner (7 Designations). Our subscription plans offer cost effective options providing ultimate flexibility for users to have access to any Dynamics 365 product including but not limited to, Dynamics 365 for Sales, Field Service, Customer Service, and Project Service Automation.

### Service categories

- Customer relationship management (CRM)
  - Call centre
  - Constituent engagement
  - Contact management
  - CRM system
  - Customer helpdesk (service desk)
  - Feedback and reviews management
  - Forms and surveys
  - Live chat
  - Partner relationship management (PRM)
  - Virtual agents
  - Other CRM services
- Information and communications technology (ICT)
  - Call centre
  - Forms and surveys
- Marketing
  - Forms and surveys

### Multi cloud support

Yes

## . Service features and benefits

### Service features and benefits

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## 1. Service features

- Access to all of the Dynamics 365 product sets (non-exhaustive/below)
- Microsoft Partner (7 Designations) and MS Azure Expert MSP
- Planning and merchandising
- Effective case and process management out of the box
- Chat helps agents engage in real-time with customers.
- Sales Enterprise, Customer Service Enterprise, Field Service
- Work orders, Schedule and dispatch capabilities
- Automatically schedule work orders
- Financial management - General Ledger, AP/AR, budgeting/forecasting, financial reporting
- Core Organisation & HR management functionality

## 2. Service benefits

- Benefits depending on the Dynamics 365 product sets (non-exhaustive/below)
- Create immersive shopping experiences across channels
- Personalised citizen service via any channel
- Multiple users can access Dynamics 365 applications through shared device.
- Greater flexibility of appointments and resource scheduling
- Automatically schedule work orders
- Assess your business, improve financial controls, optimise cashflow
- Complete enterprise resource planning solution
- Transform employee experiences with modern experiences to enable self-service
- Increase production speed, efficiency and product quality

## **. Service scope**

### **Add-ons and extensions**

#### 3. Software add-on or extension

No

### **Cloud deployment model**

- Public cloud
- Private cloud
- Community cloud
- Hybrid cloud

### **Service constraints**

Full details of the Microsoft Dynamics 365 service can be found here - <https://learn.microsoft.com/en-us/dynamics365/customer-insights/data/service-limits>

### **System requirements**

- Processor - 1.9GHz x86- or x64-bit dual core processor
- Memory - 2-GB RAM
- Display - Super VGA with a resolution of 1024x768
- Bandwidth greater than 1Megabit per second (125 KBps/Kilobyte per second)
- Latency under 150 ms
- Windows 10 - Internet Explorer 11, Microsoft Edge
- Windows 8.1 - Internet Explorer 11
- Windows 8 - IE10, Windows7 -IE10, IE12
- Support for Mozilla Firefox, Google Chrome and Apple Safari
- <https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/administering-dynamics-365/>

## **. Reselling**

### **Supplier type**

4. Supplier type  
I'm a reseller providing extra support
5. Organisation whose services are being resold  
Microsoft

## **. User support**

### **Email or ticketing support**

6. Email or online ticketing support  
Yes

7. Support response times

Subject to an agreed SLA

8. User can manage status and priority of support tickets

Yes

9. Online ticketing support accessibility

WCAG 2.1 AA or EN 301 549

### **Phone support**

10. Phone support

Yes

11. Phone support availability

24 hours, 7 days a week

### **Web chat support**

12. Web chat support

Yes

13. Web chat support availability

24 hours, 7 days a week

14. Web chat support accessibility standard

WCAG 2.1 AA or EN 301 549

15. Web chat accessibility testing

None

### **Onsite support**

Yes, at extra cost

### **Support levels**

Technical support options come in various costs and benefits, depending on the needs of the customer. Further details regarding the support plans can be found here - <https://www.microsoft.com/en-us/dynamics-365/support> Also Premier Support is available at further cost. <https://www.microsoft.com/en-us/unifiedsupport/overview>

### **Support available to third parties**

No

## **. How users work with your service**

### **Browsers**

16. Web browser interface

Yes

17. Supported browsers

- Microsoft Edge
- Firefox
- Chrome

### **Installation**

18. Application to install

Yes

19. Compatible operating systems

- Android
- iOS
- Linux or Unix
- macOS
- Windows

### **Mobile**

20. Designed for use on mobile devices

Yes

21. Differences between the mobile and desktop service

Dynamics 365 allows access and functionality to be provided via mobile devices with via a web browser or mobile application. The solution supports a model that only requires configuration to be carried once regardless of how the solution is accessed.

### **Service interface**

22. Service interface

No

### **User support**

23. User support accessibility  
None or don't know

## API

24. API

Yes

25. What users can and can't do using the API

The Web API provides a development experience that can be used across a wide variety of programming languages, platforms, and devices. The Web API implements the OData (Open Data Protocol), version 4.0, an OASIS standard for building and consuming RESTful APIs over rich data sources. Further details can be found here -[https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/developers-guide/mt593051\(v=crm.8\)](https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/developers-guide/mt593051(v=crm.8)) The web API is part of the Dynamics 365 Software Development Kit (SDK). The SDK contains a wealth of resources, including code samples, which are designed allow powerful vertical applications to be built using the Microsoft Dynamics 365 platform. It is a guide for developers writing solutions, server-side code, client applications and extensions, custom business logic, plug-ins, integration modules and custom workflow modules.

26. API documentation

Yes

27. API documentation formats

HTML

28. API sandbox or test environment

Yes

## Customisation

29. Customisation available

Yes

30. Description of customisation

Microsoft Dynamics 365 is a highly customisable and flexible business application. The bulk of the customisations can be carried out without requiring custom development. This included amending and creating new entities, forms, view and workflow processes. For cases that do require custom development, Microsoft provides a software developer kit (SDK).

## **. Onboarding and offboarding**

### **Getting started**

"Microsoft Dynamics 365 makes available comprehensive guidance, help, training and troubleshooting materials as part of the Microsoft Dynamics 365 Service. Within the Administration Portal, there are links to many of the resources available, including: Help articles for users and administrators who need to manage Microsoft Dynamics 365. Community forums/wikis where help articles and white papers are published Service Health dashboard for information regarding outages/issues. Microsoft offers a range of services to organisations, eg FastTrack to aid onboarding to the service, and the Dynamics Learning Portal to help partners and organisations optimise the use of the service. "

### **Documentation**

31. Service documentation

Yes

32. Documentation formats

HTML

33. Documentation accessibility standard

WCAG 2.1 AA or EN 301 549

### **End-of-contract data extraction**

At any point user can export data from Microsoft Dynamics 365. This use the Software Development Kit (SDK), manually export data using the data export functionality.

### **End-of-contract process**

No more than 180 days after expiration or termination of Customer's use of an Online Service, Microsoft will disable the account and delete Customer Data from the account. Transfer of Customer Data. Unless Customer has opted out of the Standard Contractual Clauses, all transfers of Customer Data out of the European Union, European Economic Area, and Switzerland shall be governed by the Standard Contractual Clauses. Microsoft will abide by the requirements of European Economic Area and Swiss data protection law regarding the collection, use, transfer, retention, and other processing of personal data from the European Economic Area and Switzerland. For more see <http://trustoffice365.com/>

## **. Data importing and exporting**

## **Data export approach**

Data can be exported from Microsoft Dynamics 365 through the Export to Excel feature and using web service APIs documented in the Dynamics 365 SDK. Data can also be exported using the data export service.

## **Data export formats**

### 34. Data export formats

- CSV
- Other

### 35. Other data export formats

- Data in various open formats be exported from Dynamics365
- Use the web service APIs documented in Dynamics 365 SDK.
- Files in XML Spreadsheet, TXT, CSV, XLSX

## **Data import formats**

### 36. Data import formats

- CSV
- Other

### 37. Other data import formats

- Data in various open formats be imported into Dynamics365
- Use the web service APIs documented in Dynamics 365 SDK.
- Files in XML Spreadsheet, TXT, CSV, XLSX

## **. Analytics**

### **Metrics**

#### 38. Service usage metrics

Yes

#### 39. Metrics types

Organization Insights provides quick view of key Dynamics 365 metrics such as the number of active users and page requests. The Dynamics 365 Administration Portal provides an overview of each instances 'service health' including service degradation and storage capacity

#### 40. Reporting types

Real-time dashboards



## **. Scaling**

### **Independence of resources**

The service operates multiple scale groups in each data centre and automatically provisions new customers into a scale group. The architecture of scale groups is designed to meet the many needs of operating a service at scale, including security, scalability, performance, tenant isolation, serviceability, and monitoring. Each customer has their own individual database, separate from other customers' databases. Data processing is logically segregated through capabilities specifically developed to help build, manage, and secure multitenant environments.

## **. Public sector networks**

### **Public sector networks**

41. Connection to public sector networks  
No

## **. Data-in-transit protection**

### **Protection between networks**

42. Data protection between buyer and supplier networks

- TLS (Version 1.2 or above)
- Legacy SSL and TLS (under 1.2)
- Other

43. Other protection between networks

For data in transit, all customer-facing servers negotiate a secure session by using TLS/SSL with client machines to secure the customer data. This applies to protocols on any device used by clients, such as Skype for Business Online, Outlook, and Outlook on the web. See also <http://aka.ms/Office365CE>

### **Protection within your network**

44. Data protection within supplier network

- TLS (Version 1.2 or above)
- IPsec or TLS VPN gateway
- Other

45. Other protection within supplier network  
Please see <http://aka.ms/Office365CE>

## • Asset protection

### Data storage and processing locations

46. Knowledge of data storage and processing locations

Yes

47. Data storage and processing locations

United Kingdom

48. User control over data storage and processing locations

Yes

### Datacentre security standards

Complies with a recognised standard, for example CSA CCM v3.0 or SSAE-16 / ISAE 3402

### Penetration testing

49. Penetration testing frequency

At least once a year

50. Penetration testing approach

'IT Health Check' performed by a Tigerscheme qualified provider or a CREST-approved service provider

### Protection of data at rest

51. Protecting data at rest

- Physical access control, complying with CSA CCM v3.0
- Physical access control, complying with SSAE-16 / ISAE 3402
- Encryption of all physical media
- Other

52. Other data at rest protection approach

For data at rest, the service deploys BitLocker with AES 256-bit encryption on servers that hold all messaging data, including email and IM conversations, as well as content stored in SharePoint Online and OneDrive for Business. BitLocker volume encryption addresses the threats of data

theft or exposure from lost, stolen, or inappropriately decommissioned computers and disks. Your organization's files are distributed across multiple Azure Storage containers, each with separate credentials, rather than storing them in a single database.

### **Data sanitisation process**

53. Data sanitisation process

Yes

54. Data sanitisation type

Deleted data can't be directly accessed

### **Equipment disposal approach**

Complying with a recognised standard, for example CSA CCM v.30, CAS (Sanitisation) or ISO/IEC 27001

## **. Availability and resilience**

### **Guaranteed availability**

<https://www.microsoft.com/licensing/docs>

### **Approach to resilience**

[https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/developers-guide/hh547453\(v=crm.8\)](https://learn.microsoft.com/en-us/previous-versions/dynamicscrm-2016/developers-guide/hh547453(v=crm.8))

### **Outage reporting**

Via the service status portal, Email, Alerts or Mobile Application

## **. Governance**

### **Named board-level person responsible for service security**

Yes

### **Security governance**

55. Security governance certified

Yes

56. Security governance standards

- ISO/IEC 27001

- Other
57. Other security governance standards  
FISMA/FedRamp, EU Model Clauses, HIPAA/HITECH, ISB 1596, ISO 27018, SASE16 SOC1 & SOC 2

### **Information security policies and processes**

The Microsoft Cloud Security Policy is available via the Service Trust Platform [aka.ms/stp](https://aka.ms/stp)

## **. Operational security**

### **Configuration and change management standard**

Conforms to a recognised standard, for example CSA CCM v3.0 or SSAE-16 / ISAE 3402

### **Configuration and change management approach**

The service has developed formal standard operating procedures (SOPs) governing the change management process. These SOPs cover both software development and hardware change and release management, and are consistent with established regulatory guidelines including ISO 27001, SOC 1/SOC 2, NIST 800-53, and others. Microsoft also uses Operational Security Assurance (OSA), a framework that incorporates the knowledge gained through a variety of capabilities that are unique to Microsoft. OSA combines this knowledge with the experience of running hundreds of thousands of servers in datacenters around the world.

### **Vulnerability management type**

Conforms to a recognised standard, for example CSA CCM v3.0 or SSAE-16 / ISAE 3402

### **Vulnerability management approach**

In support of the Information Security Policy, the service runs multiple layers of antivirus software to ensure protection from common malicious software. Servers within the the service environment run anti-virus software that scans files uploaded and downloaded from the service for viruses or other malware. Additionally, all mails coming into the service run through the Exchange Online Protection engine, which uses multiple antivirus and antispam engines to capture known and new threats against the system. Microsoft has its own Security Response Center (MSRC) that also supplies

information to all our customers covering the whole range Microsoft products.

### **Protective monitoring type**

Conforms to a recognised standard, for example CSA CCM v3.0 or SSAE-16 / ISAE 3402

### **Protective monitoring approach**

The service employs sophisticated software-defined service instrumentation and monitoring that integrates at the component or server level, the datacenter edge, our network backbone, Internet exchange sites, and at the real or simulated user level, providing visibility when a service disruption is occurring and pinpointing its cause. Proactive monitoring continuously measures the performance of key subsystems of the the service services platform against the established boundaries for acceptable service performance and availability. When a threshold is reached or an irregular event occurs, the monitoring system generates warnings so that operations staff can address the threshold or event.

### **Incident management type**

Conforms to a recognised standard, for example, CSA CCM v3.0 or ISO/IEC 27035:2011 or SSAE-16 / ISAE 3402

### **Incident management approach**

Please see <http://aka.ms/DynamicsSIM>

## **. Staff security**

### **Staff security clearance**

Staff screening performed but doesn't conform with BS7858:2019

### **Government security clearance**

None

## **. Secure development**

### **Approach to secure software development best practice**

Independent review of processes (for example CESG CPA Build Standard, ISO/IEC 27034, ISO/IEC 27001 or CSA CCM v3.0)

## **. Identity and authentication**

## **User authentication**

58. User authentication needed

Yes

59. User authentication

- 2-factor authentication
- Identity federation with existing provider (for example Google apps)
- Username or password
- Other

60. Other user authentication

Modern authentication brings Active Directory Authentication Library (ADAL)-based sign-in to Office client apps across platforms, enabling sign-in features such as Multi-Factor Authentication (MFA), SAML-based third-party identity providers with Office client applications, and smart card and certificate-based authentication. Cloud identity authentication - Users with cloud identities are authenticated using traditional challenge/response. Federated identity authentication - Users with federated identities are authenticated using Active Directory Federation Services 2.0 or other Security Token Services. MFA for the service - users are required to acknowledge a phone call, text, or an app notification on their smartphone after correctly entering their password. <https://learn.microsoft.com/en-us/microsoft-365/admin/m365-feature-descriptions?view=o365-worldwide&tabs=User-account-management>

## **Access restrictions in management interfaces and support channels**

The service comes with a set of administrator roles that you can assign to users in your organization. Each admin role maps to common business functions, and gives those people permissions to do specific tasks the the service admin center. <https://support.office.com/en-gb/article/About-Office-365-admin-roles-da585eea-f576-4f55-a1e0-87090b6aaa9d?ui=en-US&rs=en-GB&ad=GB> <https://support.office.com/en-gb/article/Assign-admin-roles-in-Office-365-eac4d046-1afd-4f1a-85fc-8219c79e1504?ui=en-US&rs=en-GB&ad=GB>

## **Access restriction testing frequency**

At least once a year

## **Management access**

61. Management access authentication

Username or password

## **. Audit information for users**

### **Audit for buyers' users' actions**

62. Access to user activity audit information

Users have access to real-time audit information

63. How long user audit data is stored for

Between 6 months and 12 months

### **Audit for suppliers' users' actions**

64. Access to supplier activity audit information

Users receive audit information on a regular basis

65. How long supplier audit data is stored for

Between 6 months and 12 months

### **How long system logs are stored for**

Between 6 months and 12 months

## **. Standards and certifications**

### **ISO/IEC 27001 certification**

66. ISO/IEC 27001 certification

Yes

67. Who accredited the ISO/IEC 27001

BSI

68. ISO/IEC 27001 accreditation date

26-Feb-18

69. What the ISO/IEC 27001 doesn't cover

None

### **ISO 28000:2007 certification**

70. ISO 28000:2007 certification

No

**CSA STAR certification**

71. CSA STAR certification  
Yes
72. CSA STAR accreditation date  
29/04/2016
73. CSA STAR certification level  
Level 1: CSA STAR Self-Assessment
74. What the CSA STAR doesn't cover  
None

**PCI certification**

75. PCI certification  
No

**Cyber essentials**

76. Cyber essentials  
Yes
77. Cyber essentials plus  
Yes

**Other security certifications**

78. Other security certifications  
Yes
79. Any other security certifications
- EU Model Clauses
  - EU-U.S. Privacy Shield
  - ISO 27001
  - ISO 27018
  - SOC 1, SOC 2
  - FIPS 140-2
  - HIPAA/HITECH
  - CCSL (IRAP)



- Cyber Essentials Plus