

VerseDocs security and data residency

Document generation for Dynamics 365 and Dataverse that runs as plug-ins inside your own environment. This page answers what a security review asks, from the architecture.

01

Documents are rendered inside your Dataverse environment by sandboxed plug-ins. No document, template or field value is sent to VerseBlocks or to any third party during generation.

02

Files travel as base64 in Custom API parameters, are processed in memory, and are returned the same way. VerseDocs stores nothing of its own; what you keep is what you attach or save.

03

Licence keys are validated offline in the plug-in. The only outbound calls VerseDocs can make are three explicit actions (telemetry counts, registration, feedback), each optional and each without document content.

WHERE THE WORK HAPPENS

VerseDocs is a managed Dataverse solution: a plug-in package registered as Custom APIs (vdocs_*), a model-driven admin app, two custom tables (templates and usage counts) and a command-bar button. There is no VerseBlocks web service in the generation path, no Azure resource in your subscription, no Entra app registration and no connector to consent to.

When a user clicks Generate document, or a flow calls an action, Dataverse executes the plug-in in its isolated sandbox worker in the same region as your environment. The plug-in reads the template row and the target record under the calling user's privileges, renders the document in memory, and hands the bytes back to the caller or attaches them as a note on the record. The sandbox has the same network and execution restrictions Microsoft applies to every registered plug-in.

PDF conversion runs in the same sandbox, using a commercially licensed .NET rendering library embedded in the plug-in package. VerseDocs does not use OneDrive, SharePoint, Microsoft Graph or a hosted converter to produce PDFs, and it never writes an intermediate file anywhere.

WHAT MOVES, AND WHERE

Every input and output is a Custom API parameter. Templates arrive as base64 from the template table or from your flow; data arrives as JSON or is resolved from the record; the result leaves as base64. Nothing is written to blob storage, a queue, a log or a temporary file by VerseDocs.

Data	Path	Leaves the environment?
Template files	vdocs_template row (file column) or your flow → plug-in memory	No
Record and related data	Dataverse → plug-in memory, via the binding manifest's FetchXML, under the caller's privileges	No
Generated documents	Plug-in memory → caller (base64) or timeline note on the record	No
Images for {{image:}} tokens	Your flow → plug-in memory (Options.images)	No
Usage counts	vdocs_usage table in your environment (action, duration, bytes, edition, per call)	No, unless telemetry is on: aggregates only
Licence key	vdocs_LicenseKey environment variable; verified in the plug-in	No

THE ONLY THREE THINGS THAT CAN LEAVE

Three Custom APIs can transmit to VerseBlocks. None of them runs as part of generating or converting a document; each runs only when the admin app or a flow you built calls it. Telemetry never includes document content, template content, file names or field values.

tenant. VerseBlocks does not claim third-party certifications for its own systems, and does not need access to your environment to support you. Questions for a security review go to admin@verseblocks.com and are answered in writing.

SHORT ANSWERS

Does VerseDocs send our documents to a server to convert them to PDF?

No. PDF conversion runs inside the Dataverse plug-in sandbox with a rendering library embedded in the plug-in package. No OneDrive, Graph or hosted converter is involved.

What does telemetry contain?

Organisation id, tenant id, licence edition, template count and call counts by action and month. Never document content, template content, file names or field values. It can be switched off on the Licensing page, and with no endpoint configured nothing is sent.

Does the licence check call home?

No. Keys are signed and verified offline in the plug-in on every call. The licensing service is only contacted from the Licensing page when you buy or retrieve a key.

Which region are documents processed in?

The region of the Dataverse environment the plug-in runs in. Documents never leave that environment during generation.

Can VerseBlocks access our environment?

No. There is no VerseBlocks service account, connector or app registration in your tenant. Support is by email, with whatever you choose to share.