



SECURITY  
OVERVIEW

**Microsoft Partner**  
Gold Customer Relationship Management

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## 1. Document Purpose

ClickDimensions understands that in today’s environment customers are concerned about how their data is accessed, processed and secured. Our customers must be able to trust that their data is safe and that it will only be used in a way that is consistent with their expectations.

This document has been created to provide an overview of data usage and security-related topics pertaining to the ClickDimensions solution.

## 2. Solution Overview

The ClickDimensions solution bridges the gap between sales and marketing by fully integrating marketing automation activities directly into Microsoft Dynamics CRM/Microsoft Dynamics 365.

### 2.1 Functionality

ClickDimensions is fully embedded in Microsoft Dynamics 365/CRM – all ClickDimensions features are accessed through the CRM interface.

ClickDimensions is the leading marketing automation solution for Microsoft Dynamics 365/CRM. Our fully native integration not only eliminates the need for syncing systems, it delivers unparalleled access to CRM data for better segmentation, hyper-personalization and marketing success. It also means that our solution is quick and seamless to integrate and easy to use. With essential marketing tools like email marketing, campaign automation, web intelligence, surveys, web forms, landing pages, lead scoring, social marketing and more, ClickDimensions helps Dynamics 365 users around the globe attract more leads, close more sales and more effectively engage customers.



### 2.2 Certifications and Awards

ClickDimensions is available on Microsoft’s AppSource. Our solution is Microsoft Dynamics CRM and Dynamics 365 certified and we are a Gold Microsoft Partner for CRM.

ClickDimensions was named by Microsoft as the 2012 Microsoft Dynamics Marketplace Solution Excellence Partner of the Year Award winner.

ClickDimensions was the first ever Dynamics CRM ISV to be named to the invitation-only Microsoft BizSpark One program.



## 2.3 Solution Elements

There are three key systems involved in the delivery of ClickDimensions functionality:

- ❖ Microsoft Dynamics CRM
  - ✓ Your CRM data is held securely within your CRM database
  - ✓ From your CRM instance you access the ClickDimensions tools to build, send and see statistics for emails, see website visits, build and receive posts from forms and surveys, build automated campaigns, and more
- ❖ ClickDimensions
  - ✓ ClickDimensions uses a secure two-way interface to your CRM instance to receive requests to process to enable users to design email templates, forms, landing pages and more, from within CRM. For more information about this interface, please refer to the [Connectivity](#) section of this document.
  - ✓ Only the data needed to support your marketing analytics is used by ClickDimensions to support your marketing automation. Please refer to the [Data](#) section of this document for further details.
- ❖ Microsoft Azure Hosting
  - ✓ ClickDimensions is completely hosted within Microsoft Azure and utilizes Microsoft tools to ensure the security of the limited amount of customer data that is used to create a marketing messages via email or SMS, collect information with web forms, surveys or subscription management, or track user activity with web analytics. Please refer to the [Security](#) section of this document for further details.

## 3. Connectivity

To use the robust marketing automation features of the ClickDimensions solution, ClickDimensions must be able to communicate with your CRM system. Installing ClickDimensions in your CRM sets up a two-way integration where users can access the ClickDimensions application from within CRM.

This integration also supports the submission of email jobs to the ClickDimensions cloud service. As your email messages are distributed, ClickDimensions synchronizes data such as opens, clicks, campaign automations and completed web forms, back to your CRM.

### 3.1 Web Services

ClickDimensions communicates with your CRM using only Microsoft-documented methods to interact with CRM's web services (this method is described in Microsoft's Software Development Kit). Communication via web services requires your CRM to be accessible from the web; you control how this web accessibility is delivered.

### 3.2 Connectivity Methods

ClickDimensions recommends **Internet Facing Deployment (IFD)** configuration for your on-premises CRM deployment to allow the ClickDimensions application to connect with your CRM without being on your network. Access via IFD allows the communication between the ClickDimensions solution and your CRM to be encrypted. This is the recommended secure method to enable an Azure-hosted application to communicate with an on-premises deployment of Dynamics 365/CRM.

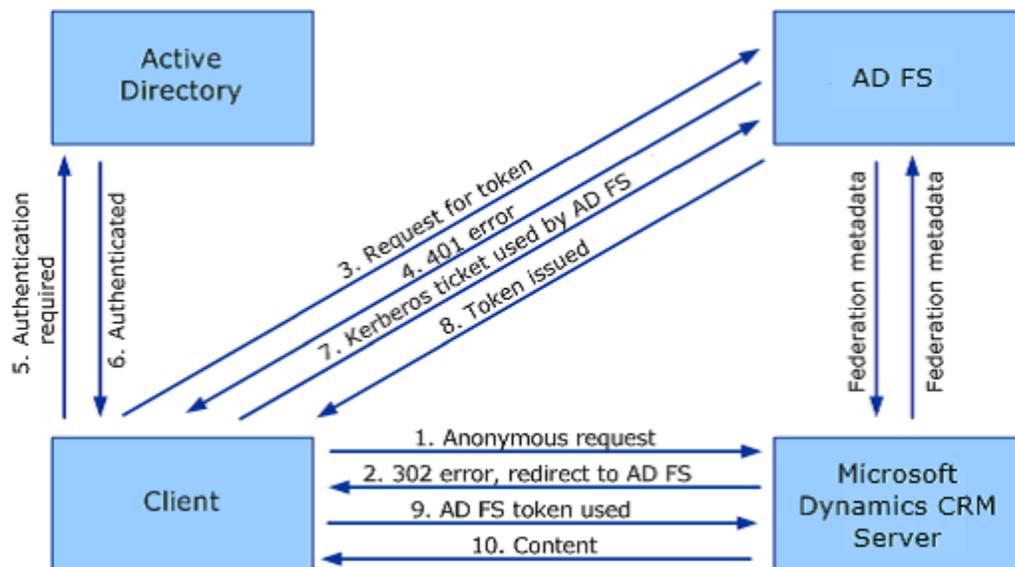
For organizations whose security requirements prevent them from permitting connections to be initiated from external sources to their on-premises CRM deployments, ClickDimensions has developed the Service Bus Relay Connector (SBRC), which does not require Active Directory Federation Services (ADFS) or IFD. This method is more complex since it requires a client proxy application to be installed and run on the customer's network, and for the network to be configured to permit the establishment of a relay with Microsoft's Azure Service Bus.

A third option for connectivity is to expose the CRM website to the internet through standard web publishing techniques. This is not recommended for production deployments.

#### 3.2.1 Internet Facing Deployment

ClickDimensions recommends that your Dynamics environment be configured for **Internet-Facing Deployment (IFD)** to support our connectivity requirements. IFD is Microsoft's recommended method for configuring secure external access to CRM. IFD uses ADFS, a claims-based authentication service.

The diagram below outlines the connection between a client application, such as ClickDimensions, and CRM when ADFS is used in an Internet-Facing Deployment of CRM. In this diagram, ClickDimensions is the Client application.



To ensure connectivity from your CRM server to the ClickDimensions application, it may be necessary to add an exception rule to allow outbound requests from CRM to the ClickDimensions web application endpoint using SSL/443. Furthermore, for inbound communications, your firewall may need to be configured to permit the ClickDimensions application to connect to the CRM and ADFS servers on the secure port configured for your CRM website. For a complete list of the IP addresses for the ClickDimensions services which may initiate inbound communication to CRM, refer to our help site article on this topic.

### 3.2.2 Service Bus Relay Connector (SBRC)

For organizations whose security requirements prevent them from permitting connections to be initiated from external sources to their on-premises CRM deployments, ClickDimensions has developed the Service Bus Relay Connector (SBRC). The SBRC is available at an additional annual cost for provisioning and ongoing support and software maintenance.

The SBRC is a small application that must be installed on a server within the customer's network and which serves as a proxy relay that interacts with Microsoft's Azure Service Bus.

From Microsoft's description of the Azure Service Bus:

"Azure Service Bus provides a hosted, secure, and widely available infrastructure for widespread communication, large-scale event distribution, naming, and service publishing. Service Bus provides connectivity options for Windows Communication Foundation (WCF) and other service endpoints...that would otherwise be difficult or impossible to reach. Endpoints can be located behind network address translation (NAT) boundaries, or bound to frequently-changing, dynamically-assigned IP addresses, or both."

The core features of the ClickDimensions SBRC are:

- Works with all current versions of on-premises CRM deployments back to CRM 2011 to connect to the ClickDimensions application in Microsoft Azure

- Does not require IFD or ADFS
- Provides highly secure, encrypted integration between ClickDimensions and on-premise CRM deployments
- Supports multi-tenant deployments
- The SBRC creates a persistent relay with the Azure Service Bus

### 3.2.2.1 Connectivity with SBRC

#### Inbound Connectivity

ClickDimensions connects to Microsoft CRM

- When ClickDimensions has data to synchronize to CRM, the ClickDimensions application in Azure connects to Microsoft's Azure Service Bus, sending encrypted data and the account's connection details to the Service Bus.

Microsoft's Service Bus connects to the SBRC

- The Service Bus in Azure uses the established relay to respond to the SBRC, sending encrypted data and connection details to the SBRC.

The SBRC connects to CRM

- The ClickDimensions proxy service, running on a server in the customer's network, connects to CRM, handling authentication and submitting data via CRM's web services.

#### Outbound Connectivity

CRM submits requests directly to ClickDimensions

- The SBRC is not involved in outbound communication from CRM to ClickDimensions.
- Requests from plugins are submitted via HTTPS directly to ClickDimensions' web service endpoints in the cloud.
- The CRM server (in particular, the Microsoft CRM Sandbox Processing Service) must be able to connect to <https://app.clickdimensions.com> (US data center accounts) or <https://app-eu.clickdimensions.com> (EU data center accounts) or <https://app-au.clickdimensions.com> (AUS data center accounts).

End users interact with the ClickDimensions web application

- End users can design templates or forms using the ClickDimensions web application UI, launched from within the CRM UI.
- The SBRC is not used except to authenticate the web application behind the scenes.

### 3.2.3 Standard Web Publishing

If you choose not to use IFD to expose your CRM website to ClickDimensions, you can make it available using standard web publishing techniques (i.e., open the firewall to a public IP for the CRM server and ClickDimensions Security Overview Version 2.0

permit direct Windows authentication). This method is appropriate for development or testing and is not recommended for production environments.

This approach can be less complex to configure than IFD. Note that this method will allow the ClickDimensions cloud service to connect to your CRM, but will not enable other applications, such as the CRM Outlook client or mobile app to access CRM while outside of your network. In this scenario, users and our service would be able to access CRM externally through standard Windows authentication.

Please note, if you provide us with only a public IP address for your CRM server, it will not be possible to use SSL, since the CRM address would need to match the SSL certificate. For example, the CRM address would need to be `https://crm.mycompany.com` so that you could apply a commercial SSL certificate that matches the address 'crm.mycompany.com'. Alternately, if you wish to use an IP address and wish to further secure the connection, you can configure your firewall to restrict access to only our IP addresses for better security, but traffic will not be encrypted if you do not use SSL. We cannot advise on firewall configuration (TMG, F5, ISA, etc.) for this setup as it is not a setup that Microsoft documents for external CRM access.

For a complete list of IP addresses for the ClickDimensions API, refer to our [help site article](#) on this topic.

### 3.3 Service User

To support the connection to your CRM system from the ClickDimensions service, a CRM user with the ClickDimensions Service User role must be created and registered with ClickDimensions.

Assignment of the ClickDimensions Service User security role to a CRM user is administered and completely controlled by you, the customer. For additional security, when you register with ClickDimensions, the details you submit are securely encrypted.

The credentials for the service user are held in a secured-state used by the ClickDimensions web services. To protect your CRM data, access to these credentials is limited to System Administrators and for the support of troubleshooting connection issues.

Changes to the service user and its password remain completely within your control and are submitted via the ClickDimensions Settings page within your CRM. All updates to the service user submitted via the ClickDimensions setting pages are securely encrypted.

## 4. Data

ClickDimensions does not directly access or copy your CRM database. Your data is maintained safely and securely in your database. However, limited amounts of data will be submitted through our web services. The specific data elements submitted and then processed by ClickDimensions depends on which tools you use and what fields you choose to include in your emails, surveys, forms and profile management page.

The below table provides an overview of the data processing and storage element for some of the key ClickDimensions functions.

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
<b>Connection Details</b>	URL, org name, domain, user name, password	- CRM Database - ClickDimensions Cloud Application	Yes
<b>Emails Sends</b>	Recipient email address, contact GUID, account GUID, lead GUID, from name, from address, email template, personalization data	- ClickDimensions Cloud Application - Email Platform	Yes – except for personalization data which is only held until emails are processed
<b>Email Events</b>	Deliveries, bounces, opens, clicks, unsubscribes, complaints, social shares	- ClickDimensions Cloud Application	Yes
<b>SMS</b>	To phone number, text content, personalization, contact GUID, lead GUID, account GUID, from phone number	- ClickDimensions Cloud Application	Yes
<b>Web Form Submission</b>	Data submitted by visitors via form fields, data collected about the visit to the page (See Web Tracking Analytics)	- ClickDimensions Cloud Application	Yes
<b>Surveys</b>	Data submitted by visitors via survey questions, data collected about the visit to the page (See Web Tracking Analytics)	- ClickDimensions Cloud Application	Yes
<b>Subscription Preferences</b>	Email address, phone number, preference (in/out), associated subscription list, data collected about the visit to the page (See Web Tracking Analytics)	- ClickDimensions Cloud Application	Yes
<b>Profile Management</b>	CRM elements included from a contact or lead record	- ClickDimensions Cloud Application	Yes

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
<b>Social</b>	User data: name, email, session IP Social media account data: account name and ID	- Oktopost	2 years
<b>Web Tracking Analytics</b>	<p>IP organizations: IP address, organization name, IP city, IP postal code, IP state, IP country</p> <p>Anonymous visits: IP organization, IP address, postal code, latitude, longitude, IP city, IP country, IP state</p> <p>Visits: time in UTC, start time, end time, score, duration, total pages, bounce (yes/no), first visit (yes/no), entry page, exit page, referrer, key words, referring host, referrer type, IP organization, IP address, IP postal code, IP country, IP state, IP city, browser, operating system, Flash version, language, Adobe Reader (yes/no), linked records (lead, contact, campaign, anonymous visitor)</p> <p>Page views: URL, page title, viewed date and time, domain, host, Adobe (yes/no), Flash version, IP address, type, campaign, browser, operating system, language, referrer, priority, score, duration, keywords, referrer type, linked records (lead, contact, anonymous visitor, visit, IP organization)</p>		No

## 4.1 Data Processing

The data you submit for processing by ClickDimensions is completely within your control. For example, if you choose to send emails (either individual or bulk) via ClickDimensions, the only information needed to process your email is the recipient(s) email address.

If you choose to use features such as personalization to add contact or lead specific fields from your CRM into your emails, the fields you select for including in the email send are needed in order for us to display that information in the recipient's email.

All data submitted is encrypted in transit between CRM and ClickDimensions.

### 4.1.1 Email Sends

An email send is the record in CRM that a user creates to define the properties of an email job. Anytime an email is sent through ClickDimensions, the customer/user creates an email send record.

When email sends are sent, a request is posted to ClickDimensions via securely encrypted web services where they are processed by our services and individual email messages are created for distribution to your email recipients.

The data required by ClickDimensions to process an email send record is the email template, the recipient(s) email address(es) and record IDs, the email send properties, and unsubscribe/subscription preference information. After this information is submitted for processing, the email address and record ID is held in our system so that email statistics for the distributed emails can be correlated and posted back into your CRM system for reporting.

### 4.1.2 Email Events

Email events such as clicks, opens, unsubscribe and spam are broadcasted to ClickDimensions' cloud platform in real time, because of email sends. ClickDimensions processes the events and produces aggregated statistics in relation to the requests and email recipients which generated the events. The events and related aggregation are stored in ClickDimensions cloud platform and synced back to the customers' CRM database.

### 4.1.3 Personalized Email Sends

One of the benefits of using ClickDimensions in your CRM is that you can personalize emails with CRM data. Emails can be personalized with information from lead, contact and account records as well as the sender (user) record. You decide the specific information to include in your personalized email templates. Many customers choose to include things such as the recipient's first name or the name and email signature of a company representative that the email is coming from.

Emails templates can be customized using the Add Dynamic Content button within the email editor to insert the desired information from lead, contact, account and user (owner of lead, contact or account) records into your template.

It is important to understand that any dynamic content (personalized fields) added to your email templates will be transferred to ClickDimensions when the email send is transferred for processing.

This data will reside within the ClickDimensions system to facilitate correlation of recipient interactions and synchronization of this data back to your CRM.

#### 4.1.4 SMS

SMS allows you to send text messages to your leads, contacts or accounts. The messages are sent to the mobile numbers of the lead, contact and/or account records that have opted-in to receive SMS. SMS content can be personalized with CRM data just like emails, and statuses of the text messages are synced back to your CRM. Recipients can also reply to text messages, which will create a text message activity record in your CRM.

SMS are sent through integrations with Twilio, MessageNet or BulkSMS.

Mobile phone numbers and text content resides within the ClickDimensions system to facilitate correlation of recipient interactions and synchronization of this data back to your CRM.

#### 4.1.5 Web Forms

Forms allow your visitors to submit information such as their name, location and email address, which you can then store in your CRM. Such information can be used in a great variety of ways and can help you, for example, see areas in which your product has garnered the most interest, add customers to your email lists or even identify new visitors. Forms can be embedded in landing pages or directly on your website, and submitted forms can be tied to the lead or contact that supplied the information.

It is important to understand that data submitted in a form by your web visitor will be transmitted (via securely encrypted web services) to ClickDimensions for processing, and will then be transferred into your CRM system. This data is also logged within the ClickDimensions application.

#### 4.1.6 Surveys

Surveys are a way to get feedback from your customer base or other clients. They allow users to answer a set of questions you provide to capture insight on how your product or service is being received. For example, users can submit valuable data such as a rating of the product, whether they would recommend it to a friend or their favorite product feature. Surveys can be embedded in landing pages, or directly on your website, and answered survey questions can be tied to the lead or contact that supplied the information.

It is important to understand that when a lead or contact submits a survey, the answers to the survey questions will be transferred to ClickDimensions for processing and will, in turn, be held securely within ClickDimensions.

#### 4.1.7 Subscription Management

Subscription management is a process used to allow customers or clients to choose which emails or SMS messages they would like to receive from you by letting them opt-in to some and out of others. For example, a customer may want your newsletter and special offers emails, but not want to subscribe to company events.

The preferences set by your recipients are kept within ClickDimensions for faster processing when sending the emails and text messages. If the recipient fills out a subscription page, a form with a field mapped to a subscription list or you import preferences using the import tool, they will be stored both in your CRM and on ClickDimensions.

#### 4.1.8 Profile Management

Profile management allows you to put a link to a form in your emails which will pre-populate with that contact or lead's information. This means you can show them what information you already have and let them update the current information and/or add new information.

It is important to understand that when you enable profile management, the data fields that you choose to include in the profile (the pre-populated fields) will be transferred to ClickDimensions for processing and will in turn be held securely within ClickDimensions.

A note about data privacy: if profile management links are used within an email, anyone that has access to that link will be able to view the CRM fields selected for that profile. If the email is forwarded to another recipient, the second recipient will be able to see the CRM data for the original recipient.

### 4.1.9 Social Marketing and Social Engagement

Social marketing via ClickDimensions allows customers to manage their social media activity through CRM. Posts can be made from the customer's Dynamics to Facebook, LinkedIn, Twitter and Google+. The status and content can be viewed in CRM.

Social engagement is an add-on module to the ClickDimensions solution, providing advanced analytics, employee advocacy, content curation and more. It is managed through an integration with Oktopost.

#### 4.1.9.1 Web Analytics

Web analytics captures data relevant to page visits that occur on web pages where you have added the ClickDimensions tracking script.

The Web analytics data that can be captured includes the following:

**IP Organizations:** IP Address, Organization Name, IP City, IP Postal Code, IP State, IP Country

**Anonymous Visits:** IP Organization, IP Address, Postal Code, Latitude, Longitude, IP City, IP Country, IP State

**Visits:** Time in UTC, Start Time, End Time, Score, Duration, Total Pages, Bounce (yes/no), First Visit (yes/no), Entry Page, Exit Page, Referrer, Key Words, Referring Host, Referrer Type, IP Organization, IP Address, IP Postal Code, IP Country, IP State, IP City, Browser, Operating System, Flash Version, Language, Adobe Reader (yes/no), linked records (lead, contact, campaign, anonymous visitor)

**Page Views:** URL, Page Title, Viewed Date and Time, Domain, Host, Adobe (yes/no), Flash Version, IP Address, Type, Campaign, Browser, Operating System, Language, Referrer, Priority, Score, Duration, Keywords, Referrer Type, Linked Records (lead, contact, anonymous visitor, visit, IP Organization)

The web analytics data collected will be transferred to ClickDimensions for processing. It will then be synced back to your CRM environment. After transmission to your CRM environment, no web analytics data is held by ClickDimensions; the data resides only within your CRM environment.

Please note, not all the data elements referenced above are always able to be collected (for example, longitude and latitude are not always provided). The data that can be collected will depend what the IP provider makes available, what browser is used and several other factors.

ClickDimensions provides two tracking scripts that customers may use on their sites:

- **Tracking Script:** Displays a pop-up with information that web tracking is being used on the site. This allows visitors to decide to proceed on the site with the tracking, to leave the site or to adjust their browser privacy settings.

- Opt-out Tracking Script: Displays a pop-up with information that web tracking is being used on the site. Visitors have two options: select OK to proceed on the site with tracking or select Disable, which will disable web tracking for the timeframe (six months is the default setting for timeframe). This setting is unique to the device and browser.

### 4.3 Data Storage

The data you provide to ClickDimensions to facilitate your marketing is held securely in Microsoft's Azure data center as long as your account's subscription remains active. Access to this data is securely controlled and only available for support purposes.

The data will reside within the ClickDimensions system to enhance performance and to limit the data queries back to the customer's CRM.

### 4.4 Data Access

Access to any data you submit to ClickDimensions is tightly controlled. This data will only be accessed as necessary to resolve a support or service issue. Access to production environments and service data is limited to those who need to know. Access is secured through multi-factored authentication.

The ClickDimensions support and development staff may access email send data for support and troubleshooting purposes.

ClickDimensions services are completely hosted within Microsoft Azure data center. As such, no ClickDimensions personnel have physical access to any of the servers. Physical access to the data centers is completely controlled by Microsoft.

### 4.5 Data Ownership

You own your data. ClickDimensions uses the limited data you submit only to provide the services agreed upon in accordance with the mutually agreed upon Terms of Service. We do not use customer data or derive information from it for advertising.

### 4.6 Data Location

In today's regulatory environment it is important to know where your account is located. ClickDimensions utilizes Microsoft Azure data centers in the EU, the United States, Canada and Australia. For more information about Azure data center locations, view our [Subprocessor List](#).

A complete version of our cloud application is hosted within each data center; your account's processing and related data will reside in the data center in which your account is hosted.

### 4.7 Data Privacy

Your data is kept completely secure and private. ClickDimensions will never access or use your data for any purpose other than as necessary to deliver the ClickDimensions functionality.

If a government requests customer data—including for national security purposes—it must follow the applicable legal process, serving us with a court order for content or a subpoena for account information. If compelled to disclose customer data, we will promptly notify you and provide a copy of the demand, unless legally prohibited

from doing so. We do not provide any government with direct or unfettered access to customer data except as you direct or where required by law.

#### 4.7.1 Privacy Shield

ClickDimensions complies with the EU-U.S. Privacy Shield Framework and the Swiss–U.S. Privacy Shield Framework as set forth by the U.S. Department of Commerce regarding the collection, use and retention of personal information transferred from the European Union and Switzerland to the United States, respectively. ClickDimensions has certified to the Department of Commerce that it adheres to the Privacy Shield Principles. If there is any conflict between the terms in this privacy policy and the Privacy Shield Principles, the Privacy Shield Principles shall govern. To view a description of how ClickDimensions complies with these Privacy Shield Principles, please visit <http://clickdimensions.com/about/privacy-shield/>. To learn more about the Privacy Shield program, and to view our certification, please visit <https://www.privacyshield.gov/>.

#### 4.7.2 GDPR

ClickDimensions is committed to GDPR compliance and have provided tools to facilitate our customers' compliance with the EU data protection requirements, including those in the General Data Protection Regulation (GDPR). If a company collects, transmits, hosts or analyzes personal data of EU citizens, GDPR requires the company to use third-party data processors who guarantee their ability to implement the technical and organizational requirements of the GDPR. Our standard Customer DPA covers additional contractual provisions required by GDPR and is [available for review on our website](#).

#### 4.7.3 Vendor Oversight

ClickDimensions is responsible for oversight of third-party service providers. Management will exercise due diligence in the selection or retention of its service providers, contractually require its service providers to implement appropriate measures designed to meet the objectives of this policy surrounding information security and monitor the service providers to confirm the obligations of securing information have been met.

### 5. Security

The ClickDimensions application is hosted in Microsoft Azure because Microsoft uses best-in-class security practices. The following describes security measures used by Microsoft Azure.

#### 5.1 Azure Security

Security and privacy are embedded into the development of Azure. Microsoft makes security and privacy a priority at every step, from code development through incident response. Please refer to the Microsoft Azure Trust Center for more in-depth security details related to Azure.

##### 5.1.1 Network Security

Operational Security Assurance (OSA) makes the infrastructure of Microsoft cloud-based services more resilient to attack by decreasing the amount of time needed to prevent, detect and respond to real and potential Internet-based security threats. It ensures that operational activities follow rigorous security guidelines and validates that

these guidelines are followed effectively. When issues arise, a feedback loop helps ensure that future revisions of OSA support mitigations to address them. Azure monitors and blocks unauthorized traffic to and within Microsoft data centers, using a variety of technologies such as layer 7 technologies, firewalls, partitioned local area networks (LANs) and the physical separation of back-end servers from public-facing interfaces.

## 5.2 Azure Threat Management

Microsoft's global incident response team works around the clock to mitigate the effects of any attacks against the security of Azure. The teams are backed by centers of excellence that fight digital crime, respond to security incidents and vulnerabilities in Microsoft software, and Azure's DDoS defense system is not only designed to withstand attacks from the outside, but from other Azure tenants as well. Azure uses standard intrusion detection and mitigation techniques such as SYN cookies, rate limiting and connection limits to protect against these attacks.

### 5.2.1 Penetration Testing

Microsoft conducts regular penetration testing to improve Azure security controls and processes on their infrastructure. As an additional measure, ClickDimensions conducts its own application penetration tests twice annually to ensure data security.

## 6. ClickDimensions Web Pages

### 6.1 Accessing ClickDimensions Web Pages

1. The ClickDimensions custom entities in CRM (e.g., email send, visit, etc.) and web pages (e.g., email editors, campaign automation builder, etc.) are only accessible by authenticated and authorized CRM users. To access them a user must both be authenticated by CRM, and have the appropriate security roles to view/edit ClickDimensions entities/pages. ClickDimensions has the capability to restrict access based on the CRM security roles, since the CRM User ID is provided by the request.
2. The URLs of the ClickDimensions web pages contain unique identifiers of the user, the account and the underlying CRM entity's GUID. These URLs cannot be manually generated by someone without access to CRM and to the entity.
3. The ClickDimensions web pages are not indexed by search engines, unless links to specific pages are published by the user in crawlable websites.

### 6.2 Security for ClickDimensions Web Pages

Access to the ClickDimensions pages relies on the MSCRM user management system. When a ClickDimensions page is opened, the following actions will take place:

1. Custom JavaScript executes inside the MSCRM context and will retrieve the user's identifier.
2. The custom JavaScript creates a new record with a unique identifier in a custom entity called User Session.
3. The user's identifier and the User Session identifier is appended to the ClickDimensions page URL that is accessed.

4. When the ClickDimensions web server receives the page request, it uses the User Session identifier to validate the request by querying MSCRM for that specific record. The validation makes sure that the record was created within the last 60 minutes. Communication with ClickDimensions' web server is done over https.
5. A cookie is added to the response which will indicate that the session has been validated such that consecutive calls will not need to be re-validated. The cookie will contain the user agent and will be encrypted.

Example of the page URL:

```
https://mscrmapp.clickdimensions.com/editor/ddeditor?accountKey=<unique account key>&orgname=<organization name>&userid=1033&id=<MSCRM entity ID>&type=10003&typename=cdi_emailtemplate&version=4&rand=6ec3a53a-06b6-49b4-afc5-76a53d58fa2d&userid={4DB0DF39-9669-4758-ADAF-F2FE284678D8}&sessionId=b8de6705-5382-e711-8118-e0071b6ad131
```

## 6.4 Accessing a Secured Web Page

When the ClickDimensions page is accessed within MSCRM by an authenticated MSCRM user, with the appropriate security roles, the ClickDimensions page will be accessible. The page with the unique link would only be accessible to the user who accessed it, from the same device and browser, and within the session time frame.

1. If the link is shared with another user, the page will deny access. See example of the error message below:

### Security Error



A security error has occurred. Make sure you are signed into Microsoft Dynamics CRM and try again.

2. ClickDimensions Support agents can access the ClickDimensions page, with the unique URL, by using a dedicated internal tool, protected by ClickDimensions ActiveDirectory user access.

## 7 Appendix A: Frequently Asked Questions

Question	Answer
<p><b>How does ClickDimensions communicate with my CRM?</b></p>	<p>Installing ClickDimensions in your CRM sets up a two-way integration between your CRM and the ClickDimensions services.</p> <p>ClickDimensions communicates with your CRM using only Microsoft-documented methods to connect to CRM's web services (this method is described in Microsoft's Software Development Kit).</p>
<p><b>Is there a recommended method for allowing connectivity to my CRM?</b></p>	<p>ClickDimensions recommends that your CRM environment be configured for Internet-Facing Deployment (IFD) to support our connectivity requirements. IFD is the Microsoft's recommended method for configuring secure external access to CRM.</p> <p>Dynamics CRM requires Active Directory Federation Services (ADFS), a claims-based authentication service.</p>
<p><b>Are communications between my CRM and ClickDimensions encrypted?</b></p>	<p>If connection is supported via IFD, communication between ClickDimensions and your CRM is encrypted.</p>
<p><b>Can I restrict the IP addresses that can access my CRM via IFD?</b></p>	<p>Yes, you can restrict access via your firewall to just our IP addresses. A list of these IP addresses can be found on the ClickDimensions help and support site (or by clicking <a href="#">here</a>).</p>
<p><b>Is the communication between ClickDimensions and my CRM secure?</b></p>	<p>Yes. If you register your CRM using an address that starts with HTTPS, then our connection to your CRM will always be securely encrypted using the SSL certificate you have installed on your CRM website (or the one used by Microsoft for CRM Online). Note that self-signed SSL certificates are not supported.</p>
<p><b>What are the IP addresses of ClickDimensions' service in Azure?</b></p>	<p>A list of these IP addresses can be found on the ClickDimensions help and support site (or by clicking <a href="#">here</a>).</p>

Question	Answer
<b>Are any connection methods besides IFD supported?</b>	<p>You can expose the CRM website to the internet through standard web publishing techniques (open the firewall to a public IP for the CRM server and permit direct Windows authentication).</p> <p>This approach can be less complex to configure than IFD.</p> <p>This method will allow the ClickDimensions cloud service to connect to your CRM. In this scenario our service would be able to access CRM externally through standard Windows authentication.</p> <p>Note: If you provide us with just a public IP address for your CRM server, it will not be possible to use SSL, since the CRM address would need to match the SSL certificate. For example, the CRM address would need to be <code>https://crm.mycompany.com</code> so that you could apply a commercial SSL certificate that matches the address <code>crm.mycompany.com</code>.</p> <p>Alternately, if you wish to just use an IP address and wish to further secure the connection, you can configure your firewall to restrict access to only our IP addresses for better security, but traffic will not be encrypted if you do not use SSL. Also, please note that we cannot advise on firewall configuration (TMG, F5, ISA, etc.) for this setup as it is not a setup that Microsoft documents for external CRM access.</p>
<b>What firewall changes are needed to allow ClickDimensions proper access to my CRM?</b>	<p>Many corporate firewalls restrict traffic to web services by IP addresses and ports using firewalls, proxies and other security mechanisms. If this is the case in your environment, this can cause ClickDimensions and CRM to be unable to communicate.</p> <p>A list of IP addresses that may need an exception through your firewall can be found on the ClickDimensions help and support site (or by clicking <a href="#">here</a>).</p>

Question	Answer
<b>Are networks with proxies supported?</b>	No, the outgoing request to our API will not supply proxy authentication credentials and may ultimately fail. To circumvent this issue, you will need to add the ClickDimensions IP addresses to the Proxy Bypass List. A list of these IP addresses can be found on the ClickDimensions help and support site (or by clicking <a href="#">here</a> ).
<b>Do you support VPN's or Azure Connect?</b>	We do not support VPNs or Azure Connect.
<b>What if my company policy does not permit connections to applications inside our firewall?</b>	Some customers have deployed an additional CRM web front end server in their DMZ to provide external access to their CRM system's web services. This is an option you can explore with your CRM partner and network administrator.
<b>Will my data leave the EU? Where does ClickDimensions maintain data centers?</b>	ClickDimensions uses Azure data centers located in the US, the EU, Australia and Canada. When you register your solution file, you will be given the choice to register your solution for the appropriate data center. Our EU specific implementations ensure that no data will be transmitted outside the EU. This setup has been established to comply with the requirements of our many customers located in the EU.
<b>Can I retain control of the password that ClickDimensions uses to connect to my CRM?</b>	Yes, when you register your CRM with ClickDimensions, the connection information is securely transmitted in encrypted format. At any time after installing ClickDimensions, you can change the password our system uses from within CRM by clicking on Settings.  > ClickDimensions Settings > Service Credentials. (Note that you must update it here prior to changing the password for the user.)
<b>Are backups or other customer data stored on any removable media or mobile devices?</b>	Customer data and confidential information is not stored on any removable media or mobile device.

Question	Answer
<b>What are your policies regarding security or data breaches?</b>	ClickDimensions maintains a detailed incident management and response plan. In the event of a security breach, we will notify customers according to our Data Breach Notification Policy. If the security breach impacts personal data, we will notify our customers (the data controllers) without undue delay.
<b>What is ClickDimensions' backup and/or disaster recovery plan?</b>	Part of our disaster recovery process relies on our services hosted in cloud technology, which includes data backups. We also have redundancy between global offices.
<b>What are ClickDimensions' policies for data redundancy and backup?</b>	Services deployed in several regions around the globe. Key service data is fully backed up daily and partially every 30 minutes. Data is replicated in three storage environments.
<b>Does ClickDimensions use a Password Management Policy?</b>	Yes, passwords changes on regular basis enforced by Group Policy/Active Directory.
<b>How does ClickDimensions test for vulnerabilities on their network or devices?</b>	Standard technology is used for protecting network environments such as anti-virus, firewall and scanners. Outside resources are consulted on a routine basis to ensure against network vulnerabilities.
<b>Does ClickDimensions have procedures in place for detecting data breaches?</b>	Yes, we use the following technologies: <ul style="list-style-type: none"> <li>- Firewall</li> <li>- Access and Identity Management</li> <li>- Database Audits</li> <li>- Behavioral Analysis tools, Log Analysis tools or Audit tools</li> <li>- Latest anti-spam/phishing technology for corporate email services</li> </ul>
<b>What types of annual training is required for employees?</b>	Information security and data privacy training is required for all employees.
<b>Does ClickDimensions have any security certifications?</b>	<ul style="list-style-type: none"> <li>- In process of pursuing SOC2</li> <li>- Privacy Shield certified for EU-US and Swiss-US</li> </ul>

Question	Answer
<p><b>How does ClickDimensions manage employee access to the production resources?</b></p>	<p>ClickDimensions employees, contractors and vendors are subject to a data access policy with strict rules governing access to production resources.</p> <ul style="list-style-type: none"> <li>- Rule-based access is utilized in the production environment.</li> <li>- Access to production environments in Azure require two-factor authentication.</li> <li>- As permitted by law, ClickDimensions employs background checks for new employees.</li> </ul>
<p><b>What happens to my data at the end of my contract?</b></p>	<p>After a contract has been terminated, ClickDimensions will keep the customer data for 90 days. After 90 days, the data will be destroyed.</p>
<p><b>What are ClickDimensions' physical access controls?</b></p>	<p>ClickDimensions employees, contractors and others are subject to information security policies that govern the handling of hardware, documents and media. Due to the cloud nature of our business, and hosting on Microsoft Azure, we do not have any servers or other storage devices located at our facilities. Our facilities employ traditional security measures and access controls.</p>
<p><b>How will ClickDimensions use my data? Can it be shared with any third party?</b></p>	<p>ClickDimensions may observe and report back to you on your usage of the service, and make recommendations to improve your experience. ClickDimensions may aggregate usage data for understanding customer behavior and improving the service; however, in no circumstance would findings include any information that could identify a customer or any confidential information. We do not share personal information with third parties unless required to provide services. Subprocessors used to provide the service can be found on our <a href="#">Subprocessors page</a>.</p>
<p><b>What controls does ClickDimensions use for contractors/subcontractors or consultants?</b></p>	<p>ClickDimensions maintains an information security policy and data access practices that apply to all employees, contractors and vendors.</p>

Question	Answer
<b>What types of security audits or third party testing is performed?</b>	Azure meets a broad set of international and industry-specific compliance standards, as well as country-specific standards. Please refer to the Microsoft Azure Trust Center for additional details. ClickDimensions consults third party security experts for review of our information security practices and recommendations. ClickDimensions performs penetration tests twice annually.