

Updated: November 10, 2022

## Purpose and Scope

The purpose of this policy is to describe the data retention policies as they pertain to ClickDimensions' customers using the Marketing Automation, Social Marketing, Intelligent Dashboards, or Customer Data Solutions services. This policy applies to the customer data that is used to provide the services in any of the ClickDimensions applications, also referred to as Service Data.

## Data Definitions

- **Marketing Automation** - includes marketing functionality focused on inbound marketing, lead management, multichannel orchestration, and campaign management. Features include email marketing, campaign automation, web intelligence, surveys, web forms, landing pages, and more, all designed to help customers market to leads and customers across a range of digital channels. Data elements for Marketing Automation include: recipient email address, recipient phone number, from name and email address, email event data (opens, clicks, unsubscribes, etc.), web form and survey submissions, profile management (contact records), web tracking data such as IP address, page visits and views, URLs, timestamps, operation system data.
- **Social Marketing** - includes social marketing functionality focused on scheduling, publishing, analytics and reporting, content curation, listening, campaign tracking and advocacy programs so customers can manage all their social media activity. Data elements for Social Marketing include: social media account name and id, user name and email address.
- **Intelligent Dashboards** - provides a holistic view of sales and marketing performance across all activities and channels by giving customers access to 13 marketing and sales dashboards designed by marketing, sales, and IT experts, tracking more than 172 best-practice KPIs across customers' marketing automation, CRM, web, and advertising channels. Data elements for Intelligent Dashboards include: aggregated metrics for email sends and events, SMS, web form submissions, web tracking, social marketing.

- **Customer Data Solutions** – includes the ClickDimensions Clean and Activate Services which is a one-time data optimization and enhancement service that helps organizations improve the quality and depth of account data in Dynamics 365 Sales. The ClickDimensions Marketing Service team assesses your data strategy. Data elements for the Customer Data Solutions includes: Account data including company name, company address, company phone number, company website.
- **Sales Engagement** - optimizes your team's time with automated follow up emails, intelligent lead scoring and smart recommendations on what your team can do next to secure the sale. Includes sales sequences based on buyer's interest and activity and a unified database for Sales and Marketing teams. Data elements for Sales Engagement include: Accounts, Contacts, Leads, Marketing Lists.

## Retention Periods

Unless otherwise noted, Service Data will be retained for the duration of the contract. Service Data is retained for the purposes of syncing to the customer's CRM, lead scoring, qualifying anonymous visitors, and to support Intelligent Dashboards historical reporting.

## Account Termination

Ninety (90) days after your Account is cancelled or terminated, an automated process will begin that permanently deletes your Service Data. Customers may request Service Data for an account to be deleted outside of an Account Termination, this process follows the same 90 day timeline.

## Data Deletion

Customers may request Service Data to be deleted on a per Subscriber basis at any time by using the Data Subject Access Request process ([EU](#) or [US](#)) or emailing [security@clickdimensions.com](mailto:security@clickdimensions.com). Subscriber Email Address and Account Key are required for the deletion requests. Requests are completed within 30 days.

Customers may request Account Data to be deleted without an account termination by contacting the Customer Success Manager or emailing [security@clickdimensions.com](mailto:security@clickdimensions.com).

The data deletion method used is Hard Delete within SQL Server. This permanently deletes the data without a recovery method.

## Application Data Deletion Timeline

### Marketing Automation

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
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Connection Details	URL, Org Name, Domain, Username, Password (Service User), Certificate or Client Secret (Application User)	<ul style="list-style-type: none"> <li>- Dynamics Database</li> <li>- ClickDimensions Cloud Application</li> </ul>	Yes
Emails Sends	Recipient Email address, Contact GUID, Account GUID, Lead GUID, From Name, From Address, Email Template, Personalization Data, Subject Line, Email Send ID	<ul style="list-style-type: none"> <li>- ClickDimensions Cloud Application</li> <li>- Email Platform</li> </ul>	ClickDimensions Cloud Application: Yes Email Platform: 90 days – except for personalization data which is only held until emails are processed
Email Events	Account GUID, Recipient GUID, Recipient Email, Message GUID, Email GUID, Event Type, Split Strategy, Is Automation, Automation GUID, Contact GUID, Entity Name (contact, lead, account), User Agent, URL Original, URL, Ip Address, Description, Platform Type, Operating System, Email Client, Device, Action Node GUID, Delivery, Hard Bounces, Soft Bounces, Spam, Errors, Clicks, Opens, Unsubscribes, Interacted Recipients, Bounced Recipients, Clicked Recipients, Recipients Unique Click Email, Recipients Opened Email	<ul style="list-style-type: none"> <li>- ClickDimensions Cloud Application</li> <li>- Email Platform</li> </ul>	ClickDimensions Cloud Application: Yes Email Platform: 90 days
Sent Email	Account GUID, Email GUID, Split Strategy, Recipient Email, Recipient GUID, Contact GUID, Entity Name (contact, lead, account), Subject, Request Created Date, From Address, Delivery, Hard Bounces, Soft Bounces, Spam, Errors, Clicks, Opens, Unsubscribes, Total Messages sent	<ul style="list-style-type: none"> <li>- ClickDimensions Cloud Application</li> </ul>	Yes
SMS Management	Account data for sms platforms (Twilio, BulkSMS and MessageMedia) – AccountSID, Token, AccountKey	<ul style="list-style-type: none"> <li>- ClickDimensions Cloud Application</li> </ul>	Yes

SMS	To phone number, text content, personalization, Contact GUID, Lead GUID, Account GUID, from phone number	- ClickDimensions Cloud Application	Yes
Event Management	Account data (user name, email address, AccountSID, Token, AccountKey) for Event Platforms such as- Webex Events, Webex Webinar, Cvent, EventBrite, Zoom Webinar, GoToWebinar and Teams.	- ClickDimensions Cloud Application	Yes
Event	Event Start Time, Event Duration, Connector Name, Event ID, Event Topic, Event Sessions, Number Registered, Organizer, Total Attendees, Event Venue Information	- ClickDimensions Cloud Application	Yes
<b>Event Participants</b>	Data submitted by event registrants via registration forms and data collected during events - Q&A and polls	- ClickDimensions Cloud Application	Yes
Web Form Submission	Data submitted by visitors via form fields, data collected about the visit to the page (See Web Tracking Analytics)	- ClickDimensions Cloud Application	Yes
Surveys	Data submitted by visitors via survey questions, data collected about the visit to the page (See Web Tracking Analytics)	- ClickDimensions Cloud Application	Yes
Subscription Preferences	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
Profile Management	CRM elements included from a Contact or Lead record	- ClickDimensions Cloud Application	Yes
Web Tracking Analytics	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, Legacy, Duration, Keywords, Referrer Type, Linked Records (lead, contact, anonymous visitor, visit, IP Organization)		No
Scoring	Score history and Score entity include the contact / lead record	ClickDimensions Cloud Application	Yes

## Social Marketing

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Social Posting	User data: name, email, session IP Social media account data: account name and id for Twitter, Facebook, and LinkedIn	- Oktopost	2 years
Social Marketing	User data: name, email, session IP Social media account data: account name and id for Twitter,	- Oktopost	2 years

	Facebook, LinkedIn, Instagram, YouTube		
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## Intelligent Dashboards

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Intelligent Dashboards	<p>Data from the following functionalities can be sourced into the Intelligent Dashboard:</p> <p>Email Sends Email Events SMS Web Form Submissions Web Analytics Social Marketing Events</p> <p>In addition, data from the following entities can be sourced into the Intelligent Dashboard:</p> <p>Accounts Contact Leads Marketing Lists</p>	- Intelligent Dashboards Cloud Application	Yes

## Sales Engagement

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Sales Engagement	<p>Data from the following entities can be sourced into the Sales Engagement:</p> <p>Accounts Contacts Leads Marketing Lists</p>	<ul style="list-style-type: none"> <li>Sales Engagement Cloud Application</li> </ul>	Yes

## Customer Data Solutions

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Customer Data Solutions	Account Name, Main Phone, Address 1: City, Address 1: Country/Region, Address 1: Country/Region Code, Address 1: State/Province, Address 1: Street 1, Web Site	- Microsoft Azure	No