ClickDimensions | SECURITY OVERVIEW

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Gold
Microsoft Partner
Microsoft

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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 Marketing Automation Solution bridges the gap between sales and marketing by fully integrating marketing automation activities directly into Microsoft Dynamics.

ClickDimensions also offers additional services to help our Microsoft Dynamics 365 customers reach their marketing goals, these services include:

Social Marketing

Intelligent Dashboards

Marketing Audit and Data Assessment

Sales Engagement

The ClickDimensions PowerPack Solution brings together three essential technologies – Marketing Automation, CRM, and Sales Engagement into an affordable, easy to implement solution.

2.1 Functionality

ClickDimensions Marketing Automation

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

The built-in email marketing capability in the ClickDimensions solution provides an intuitive experience that enables users to create and send bulk HTML emails with send, open, click, and bounce data reported at the mailing (aggregate) as well as individual recipient level. Our easy-to-use editors make creating an email simple.

ClickDimensions Marketing Automation also provides web intelligence, nurture marketing, social marketing, social discovery, form capture, surveys, SMS, event connectors and more. ClickDimensions Marketing Automation allows organizations to discover who is interested in their products, quantify their level of interest and take the appropriate actions.

Campaign Automation

Put your campaigns on auto-pilot

Email Marketing

Easily create compelling email campaigns.

Web Forms

Capture and identify new prospects with web forms

Event Management

Integrate with event and webinar solutions

Reporting

Evaluate the success of your sales and marketing efforts

Surveys

Gather insight through surveys

Web Intelligence

Discover interested prospects through web intelligence

Lead Scoring

Quickly and easily determine which leads to pursue

Landing Pages

Create landing pages without knowing HTML

SMS Messaging

Reach prospects with SMS

Social Posting

Connect with your customers and leads on social media

Marketing Calendar

Visualize and track marketing activities

Social Marketing

ClickDimensions Social Marketing is a complete social media marketing platform for Microsoft Dynamics users and is designed specifically for B2B marketers who need smart, time-saving solutions that maximize their social media ROI.

Intelligent Dashboards

ClickDimensions Intelligent Dashboards helps marketers understand what is working and what isn't working by providing a holistic view of sales and marketing performance across all activities and channels – connecting those activities directly to

sales pipeline and revenue. With Intelligent Dashboards, customers have access to 12 marketing and sales dashboards designed by marketing, sales and IT experts, tracking more than 150 best-practice KPIs across customers' marketing automation, CRM, web, and advertising channels.

ClickDimensions Marketing Audit and Data Assessment

ClickDimensions Marketing Audit and Data Assessment is a service delivered by our Marketing Services team that analyzes the accuracy of your Account Data. Reporting and actionable recommendations are provided back to the customer.

Sales Engagement

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.

ClickDimensions PowerPack

ClickDimensions PowerPack does not require Microsoft Dynamics, it is hosted on Microsoft's Power Platform.

CRM

The PowerPack CRM lets you efficiently manage contacts (including buying groups), accounts and opportunities to grow pipeline and revenue faster.

Marketing Automation

The PowerPack Marketing Automation solution includes essential marketing tools like email marketing, campaign automation, segmentation builder, landing pages, social marketing and more to help you effectively engage prospects, identify more qualified opportunities, and close more sales.

Sales Engagement

The PowerPack Sales Engagement solution helps sellers consistently engage prospects with a multi-channel outreach process that enables better qualification and drives stronger pipelines. Pre-defined engagement sequences and automation create process efficiency.

2.2 Certifications and Awards

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

2.2.1 Compliance Certifications

2.3 Solution Elements

These are three key systems involved in the delivery of ClickDimensions Marketing Automation 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. 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

  ✓ The ClickDimensions application is 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.

These are the key systems involved in the delivery of ClickDimensions Intelligent Dashboard functionality:

❖ Microsoft Dynamics CRM

  ✓ Your CRM data is held securely within your CRM database.

  ✓ From your CRM instance, you access the Intelligent Dashboard web-based tools to view the marketing and sales dashboards.

❖ ClickDimensions

  ✓ The ClickDimensions application is hosted within Microsoft Azure and utilizes Microsoft tools to ensure the security of the limited amount of customer data that is used to for Marketing Automation activities. Please refer to the Security section of this document for further details.

  ✓ Microsoft Azure Hosting

  ✓ Microsoft Azure is used to process and aggregate the statistics from ClickDimensions Marketing Automation to build the sales and marketing dashboards. Microsoft Azure utilizes Microsoft tools to ensure the security of the limited amount of customer data. Please refer to the Security section of this document for further details.

❖ Amazon Web Services

- ✓ Amazon Web Services is used to process data and host the Intelligent Dashboards application. Intelligent Dashboards is hosted on the Amazon Web Services data center in Ireland. Amazon Web Services data centers comply with key industry standards, such as ISO/IEC 27001:2013, for security and reliability. Please refer to the Security section of this document for further details.

These are the key systems involved in the delivery of ClickDimensions Social Marketing functionality:

- ❖ Microsoft Dynamics CRM
  - ✓ Your CRM data is held securely within your CRM database.
  - ✓ Data from your CRM and ClickDimensions Marketing Automation is used to facilitate Social Posting/Social Marketing and metric data is synced back.

- ❖ ClickDimensions
  - ✓ The ClickDimensions application is hosted within Microsoft Azure and utilizes Microsoft tools to ensure the security of the limited amount of customer data that is used to for Marketing Automation activities. Please refer to the Security section of this document for further details.

- ❖ Oktopost
  - ✓ The Social Marketing platform provided by Oktopost provides the functionality for social publishing, social listening, and reporting. Oktopost is GDPR compliant and ISO/IEC 27001 certified. Please refer to the Security section of this document for further details.

These are the key systems involved in the delivery of Marketing Audit and Data Assessment:

- ❖ Microsoft Dynamics CRM
  - ✓ Your CRM data is held securely within your CRM database.

- ❖ Analytic Tools
  - ✓ The Marketing Services team uses Microsoft Azure SQL and PowerBI to complete the data assessment.

These are the key systems involved in the delivery of ClickDimensions PowerPack functionality:

- ❖ Microsoft PowerPlatform

- ❖ Microsoft Dataverse

- ❖ ClickDimensions PowerPack Solution

1. Connectivity Marketing Automation

In order to use the robust marketing automation features of the ClickDimensions Marketing Automation 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 Marketing Automation 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.

For organizations whose security requirements prevent them from permitting connections to be initiated from external sources to their on-premises Dynamics 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 Dynamics. IFD uses ADFS, a claims-based authentication service.

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

To ensure connectivity from your Dynamics server to the ClickDimensions application, it may be necessary to add an exception rule to allow outbound requests from Dynamics 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 Dynamics and ADFS servers on the secure port configured for your Dynamics website. For a complete list of the IP addresses for the ClickDimensions services which may initiate inbound communication to Dynamics, refer to our help site article on this topic.
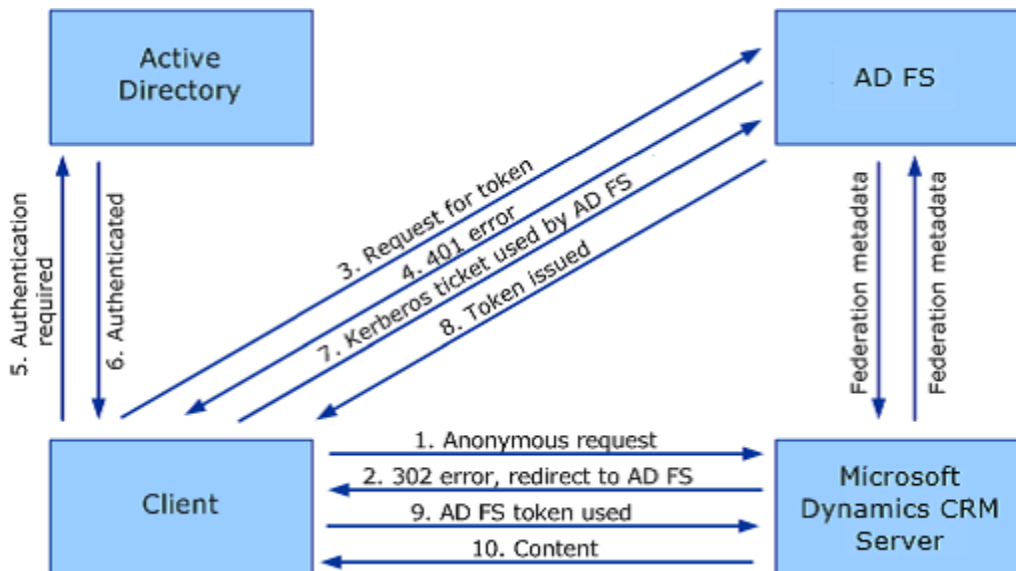
3.2.2   Service Bus Relay Connector (SBRC)

For organizations whose security requirements prevent them from permitting connections to be initiated from external sources to their on-premises Dynamics 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. More information can be found on the ClickDimensions Knowledgebase.

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:

- o   Works with all current versions of on-premises Dynamics deployments back to CRM 2013 to connect to the ClickDimensions application in Microsoft Azure

- o Does not require IFD or ADFS

- o Provides highly secure, encrypted integration between ClickDimensions and on-premise Dynamics deployments

- o Supports multi-tenant deployments

- o The SBRC creates a persistent relay with the Azure Service Bus

3.2.2.1 Connectivity with SBRC

Inbound Connectivity

ClickDimensions connects to Microsoft Dynamics

- o When ClickDimensions has data to synchronize to Dynamics, 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

- o 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 Dynamics

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

Outbound Connectivity

Dynamics submits requests directly to ClickDimensions

- o The SBRC is not involved in outbound communication from Dynamics to ClickDimensions.

- o Requests from plugins are submitted via HTTPS directly to ClickDimensions' web service endpoints in the cloud.

- o The Dynamics 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) or https://app-ca.clickdimensions.com (CA data center accounts).

End users interact with the ClickDimensions web application

- o End users can design templates or forms using the ClickDimensions web application UI, launched from within the Dynamics UI.

- o 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 Dynamics website to ClickDimensions, you can make it available using standard web publishing techniques (i.e., open the firewall to a public IP for the Dynamics server and 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 Dynamics Outlook client or mobile app to access Dynamics while outside of your network. In this scenario, users and our service would be able to access Dynamics externally through standard Windows authentication.

Please note, if you provide us with only a public IP address for your Dynamics server, it will not be possible to use SSL, since the Dynamics address would need to match the SSL certificate. For example, the Dynamics 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 Dynamics 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 Dynamics user with the 'ClickDimensions Service User' role can be created and registered with ClickDimensions.

Assignment of the 'ClickDimensions Service User' security role to a Dynamics 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.

3.4 Service Principal Authentication

This authentication method is only available to customers using D365 online. ClickDimensions offers the Service Principle authentication method for the ClickDimensions Service User to manage integration between CRM and the ClickDimensions solution. This method allows us to remove the extra step of specifying credentials in ClickDimensions Settings and directly reference the Service User's D365 credentials.

For more information including how to use this authentication method with ClickDimensions. Refer to our help site article on this topic.

3.5 Application User Authentication

Application user with client secret

This authentication method is API-only and password-less which enhances security. We highly recommend using this method. This method allows the use of an Application User for authentication to the ClickDimensions service.

For more information including how to use this authentication method with ClickDimensions. Refer to our help site article on this topic.

Application user with certificate

This authentication method is API-only and password-less which enhances security. We highly recommend using this method. This method allows the use of an Application User for authentication to the ClickDimensions service.

For more information including how to use this authentication method with ClickDimensions. Refer to our help site article on this topic.

2. Data

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, or 3rd party integrations.

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

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Connection Details	URL, Org Name, Domain, Username, Password (Service User), Certificate or Client Secret (Application User)	- Dynamics Database - ClickDimensions Cloud Application	Yes

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Emails Sends	Recipient Email address, Contact GUID, Account GUID, Lead GUID, From Name, From Address, Email Template, Personalization Data, Subject Line, Email Send ID	- ClickDimensions Cloud Application - Email Platform	ClickDimensions Cloud Application: Yes Email Platform: 90 days – except for personalization data which is only held until emails are processed
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	- ClickDimensions Cloud Application	Yes
Email Events	Account GUID, Recipient GUID, Recipient Email, Message GUID, Email GUID, Event Type, Split Strategy, Is Nurture, 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	- ClickDimensions Cloud Application - Email Platform	ClickDimensions Cloud Application: Yes Email Platform: 90 days

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
SMS Management	Account data for sms platforms (Twilio, BulkSMS and MessageMedia) – AccountSID, Token, API Key, API Secret, AccountKey	- ClickDimensions Cloud Application	Yes
SMS	Recipient 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, API User Name, API password, account name) 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
Event Participants	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) , UTMs	- ClickDimensions Cloud Application	Yes

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
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		No

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
	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)		
Scoring	Score history and Score entity include the contact / lead record	ClickDimensions Cloud Application	Yes
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, Facebook, LinkedIn, Instagram, YouTube	Oktopost	2 years
Intelligent Dashboard	Data from the following functionalities can be sourced into the Intelligent Dashboard: Email Sends Email Events SMS Web Form Submissions Web Analytics Social Marketing Events	Intelligent Dashboard Cloud Application	Yes

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
	In addition, data from the following entities can be sourced into the Intelligent Dashboard: Accounts Contact Leads Marketing Lists		
Marketing Audit and Data Assessment	Account Data including: 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
Sales Engagement	Data from the following entities can be sourced into the Sales Engagement: Accounts Contacts Leads Marketing Lists	Sales Engagement Cloud Application	Yes

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

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
CRM	Data from the following entities can be sourced into PowerPack Accounts Contacts Marketing Lists	• PowerPack • Power Platform	Yes

Sales Engagement	Data from the following entities can be sourced into Sales Engagement Accounts Contacts Marketing Lists	• PowerPack • Power Platform	Yes
Marketing Automation	See Marketing Automation table	• PowerPack • Power Platform	Yes

The below table provides an overview of the data processing and storage element for the key ClickDimensions Marketing Audit and Data Assessment services.

Functionality	Stored Data Element(s)	System(s) Holding Data	Persistent?
Marketing Audit and Data Assessment	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

4.1 Data Processing

The data you submit for processing by ClickDimensions is completely within your control. For example, if you chose 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 Dynamics and ClickDimensions.

4.1.1 Email Sends

An Email Send is the record in Dynamics that a user creates to define the properties of an email job. Any time 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, unsubscribes and spam complaints are broadcasted to ClickDimensions' cloud platform in real time, as a result 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 Sent Email

Every time you send an email via an Email Send record, ClickDimensions creates a Sent Email record for each recipient who was sent an email. In these Sent Email records, you are able to see how many times the recipient opened an email, how many times the recipient clicked on a link in the email, if the email was delivered or bounced, any unsubscribes or spam complaints.

4.1.4   Personalized Email Sends

One of the benefits of using ClickDimensions in your CRM is that you can personalize your email with CRM data. You can personalize the email with information from Lead, Contact, and Account records as well as the Sender (User) record. The specific information you include in your personalized email templates is decided by you. Many customers choose to include things such as the recipient's first name.

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 in order to facilitate correlation of recipient interactions and synchronization of this data back to your CRM.

4.1.5 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, MessageMedia, or BulkSMS.

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

4.1.6 Event Management

With Event integration and ClickDimensions you'll be able to create Event Records to keep track of hosted webinars and events and Event Participation Records (that can be associated with lead and contact records) to track participations in your webinars and events. These records will be generated automatically once an Event Connector has been set up in your CRM environment or you can create them manually as well even if you are not using an Event Connector.

ClickDimensions offers connectors to multiple event management platforms for webinar and online events– GoToWebinar, Webex Webinars, Zoom Webinar, Microsoft Teams Meetings, Eventbrite and Cvent. You can integrate as many accounts of any of these services as you like.

4.1.7 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 in which areas 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.

4.1.8 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 in order 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 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.

4.1.9 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.

4.1.10 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 Dynamics fields selected for that profile. If the email is forwarded to another recipient, the 2nd recipient will be able to see the Dynamics data for the original recipient.

4.1.11 Social Marketing

ClickDimensions Social Marketing allows customers to build their social media strategy by publishing content at scale, engaging with their audiences, and measuring valuable performance metrics. Marketers can manage their social activities from one place to all social channels: LinkedIn, Facebook, X(Twitter), YouTube, Instagram and TikTok.

Social Marketing is an add-on module to the ClickDimensions solution, managed through an integration with Oktopost.

Oktopost stores Social Account Owner name and email address. Engagement metrics do not contain PII and are transferred directly through ClickDimensions Web Analytics.

4.1.12 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, Legacy, 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 within your CRM environment or also in the Intelligent Dashboard if used.

Please note, not all of 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 2 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 2 options to choose from: select 'ok' to proceed on the site with tracking or select 'disable' which will disable web tracking for the timeframe (6 months is the default setting for timeframe). This setting is unique to the device and browser.

4.1.13 Intelligent Dashboards

ClickDimensions Intelligent Dashboards automates the extraction and processing of marketing data and presents that data through pre-defined reports. ClickDimensions Intelligent Dashboards automatically gathers data from Microsoft Dynamics and ClickDimensions Marketing Automation Platform to provide a holistic view of marketing efforts, including revenue.

Optionally, marketers can increase the potential of their dashboards by connecting to other third-party marketing data sources such as Google Analytics, Google Ads and Microsoft Advertising (Bing Ads). After performing a one-time authorization to these third-party data sources, the native API connection will automatically refresh Intelligent Dashboards.

ClickDimensions Intelligent Dashboards use Google Cloud Platform and Amazon Web Services for data storage and application hosting.

4.1.14 Marketing Audit and Data Assessment

ClickDimensions Marketing Audit and Data Assessment is a service delivered by our Marketing Services team that analyzes the accuracy of your Account Data. Reporting and actionable recommendations are provided back to the customer.

4.1.15 Sales Engagement

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.

ClickDimensions Sales Engagement uses Microsoft Azure for data storage and application hosting.

4.1.16 PowerPack

PowerPack combines the 3 most critical sales and marketing automation solutions– Marketing Automation, CRM and Sales Engagement, into a single integrated platform that makes the process faster, easier and more efficient for SMBs.

ClickDimensions PowerPack uses Microsoft PowerPlatfrom and Dataverse for data storage and application hosting.

4.2 Data Storage

The data you provide to ClickDimensions Marketing Automation 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.

The data you provide to Social Marketing or Social Posting is held securely at Oktopost for 2 years.

The data you provide to Intelligent Dashboards is stored in both Google Cloud Platform and Amazon Web Services. The data on Google Cloud Platform is held for a short time to facilitate data aggregation. The data held on Amazon Web Services is aggregated data (no personal data) and is held for 25 months.

The data you provide to Sales Engagement is stored in Microsoft Azure.

The data you provide to PowerPack as long as your account's subscription remains active.

4.3 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 hosted within Microsoft Azure data center, Amazon Web Service, Google Cloud Services. As such, no ClickDimensions personnel have physical access to any of the servers. Physical access to the data centers is completely controlled by the services provider(s).

4.4 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, sell, or share customer data or derive information from it for advertising.

4.5 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 to host our application. 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.

ClickDimensions Intelligent Dashboards uses Amazon Web Services (AWS) and Google Cloud Platform (GCP). The AWS data center is in Ireland and the GCP data centers are in the EU.

For more information about data center locations, view our [Subprocessor List](#).

4.6 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.

ClickDimensions may disclose personal information in response to subpoenas, court orders, legal process, lawful requests by public authorities (including to meet national security or law enforcement requirements), or to establish or exercise our legal rights or defend against legal claims. We may also share such information if we believe it is necessary in order to investigate, prevent, or take action regarding illegal activities, suspected fraud, situations involving potential threats to the physical safety of any person, violations of our Terms of Service, or as otherwise required by law.

4.6.1 GDPR and CCPA

ClickDimensions is committed to GDPR compliance and have provided tools to facilitate our customers' compliance with the EU and UK data protection requirements, including those in the General Data Protection Regulation (and as saved into United Kingdom law by virtue of section 3 of the United Kingdom's European Union (Withdrawal) Act 2018 (the "UK GDPR") (collectively, "GDPR). If a company collects, transmits, hosts or analyzes personal data of EU and/or UK 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](#).

In addition, ClickDimensions also acknowledges that it is prohibited from: (a) selling the personal information (as "selling" is defined in §1798.140(t) of the California Consumer Privacy Act); (b) retaining, using, or disclosing such information for any purpose other than for the specific purpose of performing the Services purchased by our customers and (c) retaining, using, or disclosing the personal information outside of the direct business relationship between ClickDimensions and its customer.

4.6.2 Vendor Oversight

ClickDimensions is responsible for oversight of third-party service providers. Management will exercise due diligence in the selection and 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 services are hosted in Microsoft Azure, Amazon Web Services and Google Cloud Platform to allow us to take advantage of best-in-class security practices.

5.1 ClickDimensions Application Security

The ClickDimensions Marketing Automation application, Sales Engagement application, and PowerPack applications are hosted in Microsoft Azure. The following describes security measures used by Microsoft Azure. More information can be found on the Microsoft Azure Trust Center.

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 actually 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 datacenters, 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.

5.1.2 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.

5.1.3 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.

5.2 ClickDimensions Intelligent Dashboards Security

The ClickDimensions Intelligent Dashboards uses Amazon Web Services (AWS) and Google Cloud Platform (GCP) to store data and host the application.

5.2.1 Amazon Web Services Security

Amazon Web Services (AWS) servers may be located in one or more global Amazon data centers. These data centers are managed and operated by (i) Amazon Web Services EMEA SARL for data centers EMEA (Europe, Middle East, Africa); and (ii) Amazon Web Services, Inc. for data centers in all other regions. These data centers comply with key industry standards, such as ISO/IEC 27001:2013, for security and reliability. The data centers are managed, monitored, and administered by AWS operations staff that have years of experience in delivering online services with 24 x 7 continuity. Detailed information about AWS security, can be found on the AWS Cloud Security site.

5.2.2 Google Cloud Platform Security

The Google Cloud Platform (GCP) is operated and managed by Google. GCP is hosted in Google data centers which are located around the globe. These data centers comply with key industry standards, such as ISO 27001, ISO 27017, ISO 27018, SOC 1-3, etc. The data centers are managed, monitored, and administered by GCP operations staff that have years of experience in delivering online services with 24 x 7 continuity. Detailed information about GCP security can be found on the GCP Trust & Security site.

5.3 Oktopost Security

Oktopost uses Amazon Web Services (AWS) to host their application. They use the datacenter located on AWS East. Oktopost is ISO/IEC 27001:2013 and EU-US, Swiss-US, and UK Extension Data Privacy Framework certified. Oktopost uses industry standard security tools and measures, as well as internal guidelines and organizational procedures to prevent information misuse and data leakage. The information is also protected using Amazon's Web Services cloud-based computing and data storage infrastructure (Amazon S3). You may read more about their security practices in their Security and Customer Data Protection center. More information can be found at https://www.oktopost.com/company/security.

6. ClickDimensions Web Pages

6.1 Accessing ClickDimensions Web Pages

1. The ClickDimensions custom entities in Microsoft Dynamics (e.g., email send, visit, etc.) and web pages (e.g., email editors, campaign automation builder, etc.) are only accessible by authenticated and authorized Dynamics users. In order to access them a user must both be authenticated by Dynamics and have the appropriate security roles to view/edit ClickDimensions entities/pages. ClickDimensions has the capability to restrict access based on the Dynamics security roles, since the Dynamics 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 Dynamics entity's GUID. These URLs cannot be manually generated by someone without access to Dynamics 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 Microsoft Dynamics 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.

3. The user's identifier and the unique 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>&userlcid=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

6.3 Accessing a Secured Web Page

When the ClickDimensions page is accessed within Microsoft Dynamics by an authenticated 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 occured. Make sure you are signed into Microsoft Dynamics CRM and try again.

2. ClickDimensions Support agents are able to 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
How does ClickDimensions communicate with my CRM?	Installing ClickDimensions in your CRM sets up a two-way integration between your CRM and the ClickDimensions services. 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).
Is there a recommended method for allowing connectivity to my onprem CRM?	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. Dynamics CRM requires Active Directory Federation Services (ADFS), a claims-based authentication service.
Are communications between my onprem CRM and ClickDimensions encrypted?	Yes, communications between the customer's CRM and ClickDimensions are encrypted.
Can I restrict the IP addresses that can access my CRM via IFD?	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 clicking here).
Is the communication between ClickDimensions and my CRM secure?	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've installed on your CRM website (or the one used by Microsoft for CRM Online). Note that self-signed SSL certificates are not supported.
What are the IP addresses of ClickDimensions' service in Azure?	A list of these IP addresses can be found on the ClickDimensions help and support site (or clicking here).

Question	Answer
Are any connection methods besides IFD supported for onprem?	You can expose the Dynamics website to the internet through standard web publishing techniques (open the firewall to a public IP for the Dynamics server and permit direct Windows authentication). This approach can be less complex to configure than IFD. This method will allow the ClickDimensions cloud service to connect to your CRM. In this scenario our service would be able to access Dynamics externally through standard Windows authentication. 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 Dynamics address would need to match the SSL certificate. For example, the Dynamics 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 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 Dynamics access.
What firewall changes are needed to allow ClickDimensions proper access to my CRM?	Many corporate firewalls restrict traffic to web services by IP addresses and ports through the use of firewalls, proxies and other security mechanisms. If this is the case in your environment this can cause ClickDimensions and Dynamics to be unable to communicate. A list of IP addresses that may need an exception through your firewall can be found on the ClickDimensions help and support site (or clicking here).

Question	Answer
Are networks with proxies supported?	No, the outgoing request to our API will not supply proxy authentication credentials and may ultimately fail. In order 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 clicking here).
What if my company policy does not permit connections to applications inside our firewall?	Some customers have deployed an additional Dynamics web front end server in their DMZ in order 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.
Will my data leave the EU? Where does ClickDimensions maintain data centers?	ClickDimensions uses 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 other than for Customer Support purposes. This setup has been established to comply with the requirements of our many customers located in the EU.
Can I retain control of the password that ClickDimensions uses to connect to my CRM?	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 actually changing the password for the user.)
Are backups or other customer data stored on any removable media or mobile devices?	Customer data and confidential information is not stored on any removable media or mobile device.

Question	Answer
What are your policies regarding security or data breaches?	ClickDimensions maintains a detailed Incident Response Policy. 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.
What is ClickDimensions' backup and/or disaster recovery plan?	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.
What are ClickDimensions' policies for data redundancy and backup?	Services deployed in several regions around the globe. Key Service data is fully backed up on a daily basis and partially every 30 minutes. Data is replicated in 3 storage environments.
Does ClickDimensions use a Password Management Policy?	Yes, passwords changes on regular basis enforced by Group Policy/Active Directory.
How does ClickDimensions test for vulnerabilities on their network or devices?	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.
Does ClickDimensions have procedures in place for detecting data breaches?	Yes, we use the following technologies: - Firewall - Access and Identity Management - Database Audits - Behavioral Analysis tools, Log Analysis tools, or Audit tools - Latest anti-spam/phishing technology for corporate email services
What types of annual training is required for employees?	Information Security Awareness, Data Privacy
Does ClickDimensions have any security certifications?	SOC 2 for Security and Confidentiality

Question	Answer
How does ClickDimensions manage employee access to the production resources?	ClickDimensions employees, contractors and vendors are subject to a data access policy with strict rules governing access to production resources. - Role based Access will be utilized in the production. - Access to production environments in Azure require 2-factor authentication. - As permitted by law, ClickDimensions employs background checks for new employees.
What happens to my data at the end of my contract?	After a contract has been terminated, ClickDimensions will keep the Marketing Automation customer data for 90 days. After 90 days the data will be destroyed.
What are ClickDimensions' physical access controls?	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 or our business, and hosting on Cloud Providers, we do not have any servers or other storage devices located at our facilities. Our facilities employ traditional security measures and access controls.
How will ClickDimensions use my data? Can it be shared with any 3rd party?	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 3rd parties unless required to provide Services. Sub-processors used to the provide the Service can be found on our Subprocessors page.
What controls does ClickDimensions use for contractors/subcontractors or consultants?	ClickDimensions maintains an Information Security Policy and data access practices that apply to all employees, contractors and vendors.

Question	Answer
What types of security audits or 3rd party testing is performed?	Our cloud providers meet a broad set of international and industry specific compliance standards, as well as country specific standards. ClickDimensions consults 3rd party security experts for review of our information security practices and recommendations. ClickDimensions performs penetration test annually.