

# Privacy Policy

Effective May 25, 2018



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## What This Policy Covers

Your privacy is important to us, and so is being transparent about how we collect, use, and share information about you. This policy is intended to help you understand the following:

- [What information we collect about you](#)
- [How we use information we collect](#)
- [How we share information we collect](#)
- [How we store and secure information we collect](#)
- [How to access and control your information](#)
- [How we transfer information we collect internationally](#)
- [Other important privacy information](#)

This privacy policy covers the information we collect about you when you use our products or services, or otherwise interact with us (for example, by attending our events), unless a different policy is displayed. We offer a wide range of products and services and refer to all these products, services and websites as "Services" in this policy.

This policy also explains your choices about how we use information about you. Your choices include how you can object to certain uses of information about you and how you can access and update certain information about you. If you do not agree with this policy, do not access or use our Services or interact with any other aspect of our business.

Where we provide the Services under contract with an organization (for example your employer) that organization controls the information processed by the Services. For more information, please refer to our [Notice to End Users](#) below.

## Information We Collect About You

We collect information about you when you provide it to us, when you use our Services, and when other sources provide it to us, as further described below.

## Information You Provide to Us

We collect information about you when you input it into the Services or otherwise provide it directly to us.

### *Account And Profile Information*

We collect information about you when you register for an account, create or modify your profile, set preferences, sign-up for or make purchases through the Services. For example, you provide your contact information and, in some cases, billing information when you register for the Services. You also may have the option of adding a display name, profile photo, job title, and other details to your profile information to be displayed in our Services. We keep track of your preferences when you select settings within the Services.

### *Content You Provide Through Our Products*

The Services include the PSI products you use, where we collect and store content that you post, send, receive and share. This content includes any information about you that you may choose to include. Examples of content we store include: attributes added for a content or dashboard record, files and links you upload to the Services, and any feedback you provide to us. If you use an on premises version of the Services, we do not host, store, transmit, receive or collect information about you (including your content), except in limited cases, where permitted by your administrator. We collect feedback you provide directly to us through the product; we collect content using analytics techniques that hash, filter or otherwise scrub the information to exclude information that might identify you or your organization; and we collect clickstream data about how you interact with and use features in the Services.

### *Content You Provide Through Our Websites*

The Services also include our websites owned or operated by us. We collect other content that you submit to these websites, which include social media or social networking websites operated by us. For example, you provide content to us when you provide feedback or when you participate in any interactive features, surveys, webinars, promotions, activities or events.

### *Information You Provide Through Our Support Channels*

The Services also include our customer support, where you may choose to submit information regarding a problem you are experiencing with a Service. Whether you designate yourself as a single point of contact, open a support ticket, speak to one of our representatives directly or otherwise engage with our support team, you will be asked to provide contact information, a summary of the problem you are experiencing, and any other documentation, screenshots or information that would be helpful in resolving the issue.

### *Payment Information*

We collect certain payment and billing information when you register for certain paid Services. For example, we ask you to designate a billing representative, including name and contact information, upon registration. You might also provide payment information, such as payment card details, which we collect via secure payment processing services.

## **Information We Collect Automatically When You Use the Services**

We collect information about you when you use our Services, including browsing our websites and taking certain actions within the Services.

### *Your Use Of The Services*

We keep track of certain information about you when you visit and interact with any of our Services. This information includes the features you use; the links you click on; the type, size and filenames of attachments you upload to the Services; frequently used search terms; and how you interact with others on the Services. We also collect information about the teams and people you work with and how you work with them, like who you collaborate with and communicate with most frequently. If you use a server or data center version of the Services, the information we collect about your use of the Services is limited to clickstream data about how you interact with and use features in the Services, in addition to content-related information described in "Content you provide through our products," above. On premises installations are not included in this use of services.

### *Device And Connection Information*

We collect information about your computer, phone, tablet, or other devices you use to access the Services. This device information includes your connection type and settings when you install, access, update, or use our Services. We also collect information through your device about your operating system, browser type, IP address, URLs of referring/exit pages, device identifiers, and crash data. We use your IP address and/or country preference to approximate your location to provide you with a better Service experience. How much of this information we collect depends on the type and settings of the device you use to access the Services. On premises installations are not included in this use of services.

## **Information We Receive from Other Sources**

We receive information about you from other Service users, from [third-party services](#), from our related companies, and from our business partners.

### *Other Users Of The Services*

Other users of our Services may provide information about you when they submit content through the Services. For example, you may be mentioned in a support issue opened by someone else. We also receive your email address from other Service users when they provide it to invite you to the Services. Similarly, an administrator may provide your contact information when they designate you as the billing or technical contact on your company's account.

### *Other Services You Link To Your Account*

We receive information about you when you or your administrator integrate or link another service with our Services. For example, if you login to an account using single sign on, we receive your name and email address as permitted by your single sign on settings to authenticate you. You or your administrator may also integrate our Services with other services you use, such as to allow you to access, store, share and edit certain content from a third-party source through our Services. For example, you may authorize our Services to access, display and store files from a third-party document-sharing service (e.g., SharePoint) within the Services interface. Or you may authorize our Services to connect with a third-party calendaring service so that your tasks are available to you through the Services. The information we receive when you link or integrate a third-party service with our Services depends on the settings, permissions and privacy policy controlled by that third-party service. You should always check the privacy settings and notices in these third-party services to understand what data may be disclosed to us or shared with our Services.

### *PSI and Other Partners*

We work with partners who provide other services around our products. Some of these partners also help us to market and promote our products and generate leads for us. We receive information from these partners, such as billing information, billing and technical contact information, company name, what PSI products you have purchased or may be interested in, evaluation information you have provided, what events you have attended, and what country you are in. We receive information about you and your activities on and off the Services from third-party partners, such as advertising and market research partners who provide us with information about your interest in and engagement with, our Services and online advertisements.

## **How We Use Information We Collect**

How we use the information we collect depends in part on which Services you use, how you use them, and any preferences you have communicated to us. Below are the specific purposes for which we use the information we collect about you.

### *To Provide The Services And Personalize Your Experience*

We use information about you to provide the Services to you, including to authenticate you when you log in, provide customer support, and operate and maintain the Services. For example, we use the name you provide in your account to identify you to other Service users. Our Services also include tailored features that personalize your experience, enhance your productivity, and improve your ability to collaborate effectively with others. We also use information about you to connect you with other team members seeking your subject matter expertise.

### *For Research And Development*

We are always looking for ways to make our Services smarter, faster, secure, integrated, and useful to you. We use collective learnings about how people use our Services and feedback provided directly to us to troubleshoot and to identify trends, usage, activity patterns and areas for integration and improvement of the Services. For example, to improve the search feature, we automatically analyze recent searches among users and how often they use the first result found. We automatically analyze and aggregate frequently used search terms to improve the accuracy of search results. In some cases, we apply these learnings across our Services to improve and develop similar features or to better integrate the services you use. We also test and analyze certain new features with some users before rolling the feature out to all users.

### *To Communicate With You About The Services*

We use your contact information to send transactional communications via secure email and within the Services, including confirming your purchases, reminding you of subscription expirations, responding to your comments, questions and requests, providing customer support, and sending you technical notices, updates, security alerts, and administrative messages. We send you secure email notifications when you or others interact with you on the Services, for example, when you are mentioned on support ticket. We also provide tailored communications based on your activity and interactions with us. For example, certain actions you take in the Services may automatically trigger a feature suggestion within the Services that would make that task easier. We also send you communications as you onboard to a Service to help you become more proficient in using that Service. These communications are part of the Services and in most cases, you cannot opt out of them. If an opt out is available, you will find that option within the communication itself or in your account settings.

### *To Market, Promote And Drive Engagement With The Services*

We use your contact information and information about how you use the Services to send promotional communications that may be of specific interest to you, including by email and by displaying PSI ads on other companies' websites and applications, as well as on platforms like Google. These communications are aimed at driving engagement and maximizing what you get out of the Services, including information about new features, survey requests, newsletters, and events we think may be of interest to you. We also communicate with you about new product offers, promotions and contests. You can control whether you receive these communications as described below under [Opt-Out of Communications](#).

### *Customer Support*

We use your information to resolve technical support issues you encounter, to respond to your requests for assistance, to analyze crash information, and to repair and improve the Services.

### *For Safety And Security*

We use information about you and your Service use to verify accounts and activity, to monitor suspicious or fraudulent activity and to identify violations of Services policies.



### *To Protect Our Legitimate Business Interests And Legal Rights*

Where required by law or where we believe it is necessary to protect our legal rights, interests and the interests of others, we use information about you in connection with legal claims, compliance, regulatory, and audit functions, and disclosures in connection with the acquisition, merger or sale of a business.

### *With Your Consent*

We use information about you where you have given us consent to do so for a specific purpose not listed above. For example, we may publish testimonials or featured customer case studies to promote the Services, with your permission.

## **Legal Bases for Processing (For EEA Users):**

If you are an individual in the European Economic Area (EEA), we are compliant with the EU General Data Protection Regulation 2016/679, more commonly known as the "GDPR". We collect and process information about you only where we have legal bases for doing so under applicable EU laws. The legal bases depend on the Services you use and how you use them. This means we collect and use your information only where:

- We need it to provide you the Services, including to operate the Services, provide customer support and personalized features and to protect the safety and security of the Services;
- It satisfies a legitimate interest (which is not overridden by your data protection interests), such as for research and development, to market and promote the Services and to protect our legal rights and interests;
- You give us consent to do so for a specific purpose; or
- We need to process your data to comply with a legal obligation.

If you have consented to our use of information about you for a specific purpose, you have the right to change your mind at any time, but this will not affect any processing that has already taken place. Where we are using your information because we or a third party (e.g. your employer) have a legitimate interest to do so, you have the right to object to that use though, in some cases, this may mean no longer using the Services.

## **How We Share Information We Collect**

We may share information through the Services and with certain third parties. We share information we collect about you in the ways discussed below, including in connection with possible business transfers, but we are not in the business of selling information about you to advertisers or other third parties.

## **Sharing with Other Service Users**

When you use the Services, we share certain information about you with other Services users.

### *For Collaboration*

You can create content, which may contain information about you, and grant permission to others to see, share, edit, copy and download that content based on settings you or your administrator (if applicable) select. You can confirm whether certain Service properties are publicly visible from within the Services or by contacting the relevant administrator.

### *Managed Accounts And Administrators*

If you register or access the Services using an email address with a domain that is owned by your employer or organization, and such organization wishes to establish an account or site, certain information about you including your name, profile picture, contact info, content and past use of your account may become accessible to that organization's administrator and other Service users sharing the same domain. If you are an administrator for a site or group of users within the Services, we may share your contact information with current or past Service users, to facilitate Service-related requests.

### *Community Forums*

Our websites offer publicly accessible blogs, forums, webinars, and documentation. You should be aware that any information you provide on these websites—including profile information associated with the account you use to post the information—may be read, collected, and used by any member of the public who accesses these websites. Your posts and certain profile information may remain even after you terminate your account. We urge you to consider the sensitivity of any information you input into these Services. To request removal of your information from publicly accessible websites operated by us, please contact us as provided below. In some cases, we may not be able to remove your information, in which case we will let you know if we are unable to and why.

## **Sharing with Third Parties**

We do not share information with third parties that help us operate, provide, improve, integrate, customize, and support our Services.

### *Links To Third Party Sites*

The Services may include links that direct you to other websites or services whose privacy practices may differ from ours. If you submit information to any of those third-party sites, your information is governed by their privacy policies, not this one. We encourage you to carefully read the privacy policy of any website you visit.

### *Social Media Widgets*

The Services may include links that direct you to other websites or services whose privacy practices may differ from ours. Your use of and any information you submit to any of those third-party sites is governed by their privacy policies, not this one.

### *With Your Consent*

We share information about you with third parties when you give us consent to do so. For example, we often display personal testimonials of satisfied customers on our public websites. With your consent, we may post your name alongside the testimonial.

### *Compliance With Enforcement Requests And Applicable Laws; Enforcement Of Our Rights*

In exceptional circumstances, with notification to you, we may share information about you with a third party if we believe that sharing is reasonably necessary to (a) comply with any applicable law, regulation, legal process or governmental request, including to meet national security requirements, (b) enforce our agreements, policies and terms of service, (c) protect the security or integrity of our products and services, (d) protect PSI, our customers or the public from harm or illegal activities, or (e) respond to an emergency which we believe in good faith requires us to disclose information to assist in preventing the death or serious bodily injury of any person.

### *Sharing With Affiliated Companies*

We share information we collect with affiliated companies and, in some cases, with prospective affiliates. Affiliated companies are companies owned or operated by us. The protections of this privacy policy apply to the information we share in these circumstances. We share information we have about you with other PSI affiliates to operate and improve products and services and to offer other PSI affiliated services to you. This includes companies that own or operate the services listed here.

### *Business Transfers*

We may share or transfer information we collect under this privacy policy in connection with any merger, sale of company assets, financing, or acquisition of all or a portion of our business to another company. You will be notified via email and/or a prominent notice on the Services if a transaction takes place, as well as any choices you may have regarding your information.

## How We Store and Secure Information We Collect

### Information Storage and Security

Our production servers are in the SSAE-16 compliant NaviSite Data Center in Andover, MA. Since 2009, PSI has collaborated with NaviSite, a global provider of enterprise-class, cloud-computing, and managed dedicated hosting solutions, for hosting our On-Demand products. NaviSite (wholly owned by Spectrum) has a proven record of accomplishment providing hosting and managed service, with more than 1,500 customers across 12 data centers. Our physical disaster recovery site is provided by Acronis/Equinix in Ashburn, VA. This allows for a warm site recovery in a disaster scenario.

We create a secure virtual environment for every hosted customer. This environment comes with its own instance of PMAPS and its own single tenant SQL database. This is unique in the proposal software market and reflects our focus on providing the highest level of IT security and privacy. No customer may enter another's environment, and data is not shared between customers. All transmitted data is encrypted using SHA256-bit encryption.

## How Long We Keep Information

### *Data Ownership*

You always own the data stored in PMAPS. Upon termination, we will provide your data to according to the terms of the subscription agreement. On premises installations are excluded because all data resides on your servers.

### *Account Information*

We retain your general account information for as long as your subscription agreement is active and a reasonable period thereafter in case you decide to re-activate the Services. We also retain some of your information as necessary to comply with our legal obligations, to resolve disputes, to enforce our agreements, to support business operations, and to continue to develop and improve our Services. Where we retain information for Service improvement and development, we take steps to eliminate information that directly identifies you, and we only use the information to uncover collective insights about the use of our Services, not to specifically analyze personal characteristics about you.

### *Information You Share On The Services*

If your account is deactivated or disabled, some of your information and the content you have provided will remain to allow your team members or other users to make full use of the Services.

### *Managed Accounts*

If the Services are made available to you through an organization (e.g., your employer), we retain your information if required by the administrator of your account. For more information, see [Managed accounts and administrators](#) above.

### *Marketing Information*

If you have elected to receive marketing emails from us, we retain information about your marketing preferences for a reasonable period from the date you last expressed interest in our Services, such as when you last opened an email from us. We retain information derived from cookies and other tracking technologies for a reasonable period from the date such information was created.

## How to Access and Control Your Information

You have certain choices available to you when it comes to your information. Below is a summary of those choices, how to exercise them and any limitations.

## Your Choices:

You have the right to request a copy of your information, to object to our use of your information (including for marketing purposes), to request the deletion or restriction of your information, or to request your information in a structured, electronic format. Below, we describe the tools and processes for making these requests. You can exercise some of the choices by logging into the Services and using settings available within the Services or your account. Where the Services are administered for you by an administrator (see "Notice to End Users" below), you may need to contact your administrator to assist with your requests first. For all other requests, you may contact us as provided in the [Contact Us](#) section below to request assistance.

### *Your Request And Choices May Be Limited In Certain Cases*

For example, your options may be limited if fulfilling your request would reveal information about another person, or if you ask to delete information which we or your administrator are permitted by law or have compelling legitimate interests to keep. If you have unresolved concerns, you may have the right to complain to a data protection authority in the country where you live, where you work or where you feel your rights were infringed.

### *Access And Update Your Information*

Our Services and related documentation give you the ability to access and update certain information about you from within the Service. For example, you can access your contact profile linked to your user account and search for content containing any information about you using key word searches in the Service. You can update your user account and/or contact profile information within your profile settings and modify content that contains information about you using the editing tools associated with the Services.

### *Deactivate Your Account*

If you no longer wish to use our Services, your administrator may deactivate your Services account. Please contact your administrator to request deactivation. If you are an administrator and are unable to deactivate an account through your administrator settings, please contact PSI support. Please be aware that deactivating your account does not delete your information; your information may remain visible to other Service users based on your past participation within the Services. For more information on how to delete your information, see below.

### *Delete Your Information*

Our Services and related documentation give you the ability to delete certain information about you from within the Service. For example, if you have permission within the Services, you can remove content that contains information about you using the key word search and editing tools associated with that content, and you can remove certain profile information within your profile settings (e.g., phone number, email address). Please note, however, that we may need to retain certain information for record keeping purposes or to comply with our legal obligations and your administrators may need to keep certain information as it pertains to your past participation within the Services (e.g., as a subject matter expert).

### *Request That We Stop Using Your Information*

In some cases, you may ask us to stop accessing, storing, using and otherwise processing your information where you believe we don't have the appropriate rights to do so. For example, if you believe a Services account was created for you without your permission or you are no longer an active user, you can request that we remove your account as provided in this policy. Where you gave us consent to use your information for a limited purpose, you can contact us to withdraw that consent, but this will not affect any processing that has already taken place at the time. You can also opt-out of our use of your information for marketing purposes by contacting us, as provided below. When you make such requests, we may need time to investigate and facilitate your request. If there is delay or dispute as to whether we have the right to continue using your information, we will restrict any further use of your information until the request is honored or the dispute is resolved, provided your administrator does not object (where applicable).

### *Opt Out Of Communications*

You may opt out of receiving promotional communications from us by using the unsubscribe option within the email, or by contacting us as provided below to have your contact information removed from our promotional email list or registration database. Even after you opt out from receiving promotional messages from us, you will continue to receive transactional messages from us regarding our Services.

### *Turn Off Cookie Controls*

Relevant browser-based cookie controls are described in our [Cookies and Tracking Notice](#).

### *Send "Do Not Track" Signals*

Some browsers have incorporated "Do Not Track" (DNT) features that can send a signal to the websites you visit indicating you do not wish to be tracked. Because there is not yet a common understanding of how to interpret the DNT signal, our Services do not currently respond to browser DNT signals. You can use the range of other tools we provide to control data collection and use, including the ability to opt out of receiving marketing from us as described above.

### *Data Portability*

Data portability is the ability to obtain some of your information in a format you can move from one service provider to another (for instance, when you transfer your mobile phone number to another carrier). Depending on the context, this applies to some of your information, but not to all your information. Should you request it, we will provide you with an electronic file of your data.

## **Other Important Privacy Information**

### **Notice to End Users**

Our products are intended for use by organizations. Where the Services are made available to you through an organization (e.g. your employer), that organization is the administrator of the Services and is responsible for the accounts and/or Service sites over which it has control. If this is the case, please direct your data privacy questions to your administrator, as your use of the Services is subject to that organization's policies. We are not responsible for the privacy or security practices of an administrator's organization, which may be different than this policy.

Administrators can:

- require you to reset your account password;
- restrict, suspend or terminate your access to the Services;
- access information in and about your account;
- access or retain information stored as part of your account;
- change the email address associated with your account;
- change profile your information;
- restrict your ability to edit, restrict, modify or delete content
- install or uninstall integrations

Even if the Services are not currently administered to you by an organization, if you use an email address provided by an organization (such as your work email address) to access the Services, then the owner of the domain associated with your email address (e.g. your employer) may assert administrative control over your account and use of the Services later. You will be notified if this happens.

Please contact your organization or refer to your administrator's organizational policies for more information.

## Changes to Our Privacy Policy

We may change this privacy policy from time to time. We will post any privacy policy changes on this page and, if the changes are significant, we will send a more prominent notice by sending designated contacts an email notification. We will also keep prior versions of this Privacy Policy in an archive for your review. We encourage you to review our privacy policy whenever you use the Services to stay informed about our information practices and the ways you can help protect your privacy.

## Our Policy Related to Children

The Services are not directed to individuals under 16. We do not knowingly collect personal information from children under 16. If we become aware that a child under 16 has provided us with personal information, we will take steps to delete such information. If you become aware that a child has provided us with personal information, please submit a request via our [support contact form](#) using the issue type **Other**.

## Contact Us

If you have questions or concerns about how your information is handled, please send an inquiry using the contact information below.

Privacy Request  
c/o Proposal Software, Inc.  
4539 Metropolitan Court  
Frederick, MD 21704 USA  
[privacy@proposalsoftware.com](mailto:privacy@proposalsoftware.com)



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Tel: 203.604.6597  
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