

# Privacy Policy

Effective as of 08/13/2021

This Privacy Policy describes how AutomaticCRM, Inc. d/b/a Connect the Dots ("CTD," "we", "us" or "our") handles personal information that we collect through our website and other digital properties that link to this Privacy Policy (collectively, the "Service"), as well as through social media, our marketing activities, and other activities described in this Privacy Policy.

If you are an employee or otherwise affiliated with an organization that has entered an enterprise agreement with us, this Privacy Policy does not apply to information that we process on behalf of that organization while providing the CTD services to them. Our use of that information is restricted by our agreement with your organization.

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## Google user data

If you connect the Service to a Gmail account, this Privacy Policy will apply to Google user data collected from this account as well as to other categories of personal information. Notwithstanding anything else in this Privacy Policy, if you provide the Service access to the following types of your Google data, the Service's use of that data will be subject to these additional restrictions:

- The Service will only use access to read Gmail message bodies (including attachments), metadata, headers, and settings to help you organize the contact details of the people with whom you exchange email, measure the strength of your connections with them, help you make

the information you see in your Service account accessible to other Service users to whom you choose to make your information available, and enable CTD to send emails on your behalf.

- The Service will not transfer this Gmail data to others unless doing so is necessary to provide and improve these user-facing features, comply with applicable law, or as part of a merger, acquisition, or sale of assets.
- The App will not use this Gmail data for serving advertisements.
- The App will not allow humans to read this data unless we have your affirmative agreement for specific messages, doing so is necessary for security purposes such as investigating abuse, to comply with applicable law, or for the Service's internal operations and even then only when the data have been aggregated and anonymized.

## Personal information we collect

**Information you provide to us.** The personal information you may provide to us through the Service or otherwise includes:

- **Contact data**, such as your first and last name, salutation, email addresses, phone number, billing and mailing addresses, and your professional titles and organizational affiliations.
- **Profile data**, such as the username and password that you may set to establish an online account on the Service, profile photos, and any other information that you add to your account profile.
- **Transaction data**, such as information relating to or needed to complete your orders on or through the Service, including order numbers and transaction history
- **Communications** that we exchange with you, including when you contact us through the Service, social media, or otherwise.
- **Marketing data**, such as your preferences for receiving our marketing communications and details about your engagement with them.
- **Financial data**, such as your payment card information.
- **User-generated content**, such as profile pictures, photos, images, videos, comments, questions, messages, and other content or information that you generate, transmit, or otherwise make available on the Service, as well as associated metadata. Metadata includes information on how, when, where, and by whom a piece of content was collected and how that content has been formatted or edited. Metadata also includes information that users can add or can have added to their content, such as keywords, geographical or location information, and other similar data.
- **Invitee data.** We may offer features that help users invite their friends or contacts to use the Service, and may collect contact details about these invitees so that we can deliver their invitations. Please do not refer someone to us or share their contact details with us unless you have their permission to do so.
- **Other data** not specifically listed here, which we will use as described in this Privacy Policy or as otherwise described at the time of collection.

**Third-party sources.** We may combine personal information we receive from you with personal information we obtain from other sources, such as:

- **Third-party accounts** to which you choose to connect your Service account. For example, when you connect an email account to the Service, we will collect and process the message bodies, headers (e.g., date, to, from, cc, bcc fields), metadata, and settings associated with the emails in the account, including contact details in email signatures (collectively, "**email data**"). We process email body information only in a transitory manner to extract header information, metadata, settings, and contact details from email signatures. We do not store any other email body information after processing is complete.

- **Enterprise customers** that give us access to the email accounts of their personnel.
- **Other users of the Service** who choose to grant you access to information in their Service accounts.
- **Public data**, including information in government records and that individuals, have been made publicly accessible on the web.
- **Licensed data** that we obtain from data licensors to help us update and enrich information about CTD users' contacts.
- **Third-party services**, such as social media services, that you use to log into, or otherwise link to, your Service account. This data may include your username, profile picture and other information associated with your account on that third-party service that is made available to us based on your account settings on that service.

**Automatic data collection.** We, our service providers, and our business partners may automatically log information about you, your computer or mobile device, and your interaction over time with the Service, our communications, and other online services, such as:

- **Device data**, such as your computer's or mobile device's operating system type and version, manufacturer and model, browser type, screen resolution, RAM and disk size, CPU usage, device type (e.g., phone, tablet), IP address, unique identifiers, language settings, and general location information such as city, state or geographic area.
- **Online activity data**, such as pages you viewed, how long you spent on a page, the website you visited before browsing to the Service, navigation paths between pages, information about your activity on a page, access times and duration of access, and whether you have opened our emails or clicked links within them.

**Cookies and similar technologies.** Like many online services, we use the following technologies:

- **Cookies**, which are small text files that websites store on user devices and that allow web servers to record users' web browsing activities and remember their submissions, preferences, and login status as they navigate a site. Cookies used on our sites include both "session cookies" that are deleted when a session ends, "persistent cookies" that remain longer, "first-party" cookies that we place, and "third party" cookies that our third-party business partners and service providers place.
- **Web beacons**, also known as pixel tags or clear GIFs, which are clear images placed in web content or HTML emails to record when a user visits a web page or views an email.
- **Local storage technologies**, like HTML5, that provide cookie-equivalent functionality but can store larger amounts of data on your device outside of your browser in connection with specific applications.
- **Session replay technologies**, we use third-party services provided by FullStory that employ software code to record users' interactions with the Services in a manner that allows us to watch DVR-like replays of those user sessions. The replays include users' clicks, mouse movements, scrolls, and keystrokes during those sessions. These replays help us diagnose usability problems and identify areas for improvement. You can learn more about FullStory at <https://www.fullstory.com/legal/privacy-policy> and you can opt-out of session recording by FullStory at <https://www.fullstory.com/optout/>.

These cookies and other technologies may be employed for the following purposes:

- **Technical operation.** To allow the technical operation of the Service, such as by remembering your selections and preferences as you navigate the site and whether you are logged in when you visit password-protected areas of the Service.
- **Functionality.** To provide enhanced functionality and personalization on the Service.
- **Analytics.** These technologies help us understand how our services are performing and being used.

## How we use your personal information

We may use your personal information for the following purposes or as otherwise described at the time of collection:

**Service delivery.** We may use your personal information to:

- provide, operate and improve the Service and our business;
- facilitate your invitations to contacts who you want to invite to join the Service;
- communicate with you about the Service, including by sending announcements, updates, security alerts, and support and administrative messages;
- understand your needs and interests, and personalize your experience with the Service and our communications; and
- provide support for the Service, and respond to your requests, questions, and feedback.

**Research and development.** We may use your personal information for research and development purposes, including to analyze and improve the Service and our business. As part of these activities, we may create aggregated, de-identified, or other anonymous data from the personal information we collect. We make personal information into anonymous data by removing information that makes the data personally identifiable to you. We may use this anonymous data and share it with third parties for our lawful business purposes, including to analyze, improve and promote the Service and our business.

**Marketing.** We may collect and use your personal information for marketing purposes:

- **Direct marketing.** We may collect and use your personal information to send you direct marketing communications. You may opt-out of our marketing communications as described in the [Opt-out of marketing](#) section below.

**Compliance and protection.** We may use your personal information to:

- comply with applicable laws, lawful requests, and legal processes, such as responding to subpoenas or requests from government authorities;
- protect our, your or others' rights, privacy, safety or property (including by making and defending legal claims);
- audit our internal processes for compliance with legal and contractual requirements and internal policies;
- enforce the terms and conditions that govern the Service; and
- prevent, identify, investigate and deter fraudulent, harmful, unauthorized, unethical or illegal activity, including cyberattacks and identity theft.

## How we share your personal information

We may share your personal information with the following parties, as otherwise described in this Privacy Policy or at the time of collection, or with your consent.

**Service providers.** Third parties that provide services on our behalf or help us operate the Service or our business (such as hosting, information technology, customer support, email delivery, marketing, payment processing, consumer research, and website analytics).

**Payment processors.** Any payment card information you use to make a purchase on the Service is collected and processed directly by our payment processors. Payment processors will use your personal information as described in their own privacy policies, so we encourage you to read them.

**Third-party platforms and social media networks.** If you have enabled features or functionality that connect the Service to a third-party platform (such as by logging in to the Service using your account with the third-party, providing your API key or similar access token for the Service to a third party, or otherwise linking your account with the Service to a third party's services), we may disclose the personal information that you authorized us to share. We do not control the third party's use of your personal information.

**Professional advisors.** Professional advisors, such as lawyers, auditors, bankers, and insurers, were necessary in the course of the professional services that they render to us.

**Authorities and others.** Law enforcement, government authorities, and private parties, as we believe in good faith to be necessary or appropriate for the compliance and protection purposes described above.

**Business transferees.** Acquirers and other relevant participants in business transactions (or negotiations and due diligence for such transactions) involving a corporate divestiture, merger, consolidation, acquisition, reorganization, sale or other disposition of all or any portion of the business or assets of, or equity interests in CTD (including in connection with a bankruptcy or similar proceedings).

**Other users.** You can choose to give other users of the Service access to your profile, contact network, strength and existence of your relationships, communication history, and other user-generated content. We are not responsible for other users' use of this information.

## Your choices

**Access or update your information.** If you have registered for an account with us through the Service, you may review and update certain account information by logging into the account.

**Opt-out of marketing communications.** You may opt-out of marketing-related emails by following the opt-out or unsubscribe instructions at the bottom of the email, or by [contacting us](#). Please note that if you choose to opt-out of marketing-related emails, you may continue to receive service-related and other non-marketing emails.

**Cookies.** Most browsers let you remove or reject cookies. To do this, follow the instructions in your browser settings. Many browsers accept cookies by default until you change your settings. Please note that if you set your browser to disable cookies, the Service may not work properly. For more information about cookies, including how to see what cookies have been set on your browser and how to manage and delete them, visit [www.allaboutcookies.org](http://www.allaboutcookies.org).

**Do Not Track.** Some Internet browsers may be configured to send “Do Not Track” signals to the online services that you visit. We currently do not respond to “Do Not Track” or similar signals. To find out more about “Do Not Track,” please visit <http://www.allaboutdnt.com>.

**Linked third-party platforms.** If you choose to connect to the Service through your social media account or other third-party platforms, you may be able to use your settings in your account with that platform to limit the information we receive from it. If you revoke our ability to access information from a third-party platform, that choice will not apply to information that we have already received from that third party.

## Other sites and services

The Service may contain links to websites and other online services operated by third parties. In addition, our content may be integrated into other online services that are not associated with us. These links and integrations are not an endorsement of, or representation that we are affiliated with, any third party. We do not control any online services operated by third parties, and we are not responsible for their actions. We encourage you to read the privacy policies of the other online services you use.

## Security

We employ a number of technical, organizational, and physical safeguards designed to protect the personal information we collect. However, the security risk is inherent in all internet and information technologies and we cannot guarantee the security of your personal information.

## International data transfer

We are headquartered in the United States and may use service providers that operate in other countries. Your personal information may be transferred to the United States or other locations where privacy laws may not be as protective as those in your state, province, or country.

## Children

The Service is not intended for use by anyone under 18 years of age. If you are a parent or guardian of a child from whom you believe we have collected personal information in a manner prohibited by law, please [contact us](#). If we learn that we have collected personal information through the Service from a child without the consent of the child’s parent or guardian as required by law, we will delete it.

## Changes to this Privacy Policy

We reserve the right to modify this Privacy Policy at any time. If we make material changes to this Privacy Policy, we will notify you by updating the date of this Privacy Policy and posting it on the Service. If required by law we will also provide notification of changes in another way that we believe is reasonably likely to reach you, such as via email or another manner through the Service. Any modifications to this Privacy Policy will be effective upon our posting the modified version (or as otherwise indicated at the time of posting). In all cases, your use of the Service after the effective date of any modified Privacy Policy indicates your acceptance of the modified Privacy Policy.

# How to contact us

CTD  
Automatic CRM, Inc.  
548 Market Street, PMB 77624  
San Francisco CA94104-5401  
United States

[info@ctd.ai](mailto:info@ctd.ai)

## California privacy rights notice

This section of the Privacy Policy applies only to California residents. It describes how we collect, use, and share the Personal Information of California residents in our capacity as a “business” under the California Consumer Privacy Act (“**CCPA**”) and their rights with respect to that Personal Information. For purposes of this section, the term “**Personal Information**” has the meaning given in the CCPA but does not include information exempted from the CCPA’s scope. In some cases, we may provide a different privacy notice to certain categories of California residents, such as job applicants, in which case that notice will apply instead of this section.

**Your California privacy rights.** California residents have the rights listed below under the CCPA. However, these rights are not absolute, and in certain cases, we may decline your request as permitted by law.

- **Information.** You can request the following information about how we have collected and used your Personal Information during the past 12 months:
    - The categories of Personal Information that we have collected.
    - The categories of sources from which we collected Personal Information.
    - The business or commercial purpose for which we collected and/or sold Personal Information.
    - The categories of third parties with which we share Personal Information.
    - The categories of Personal Information that we sold or disclosed for a business purpose, and for each category identified, the categories of third parties to whom the Personal Information was sold or disclosed.
  - **Access.** You can request a copy of the Personal Information that we have collected about you during the past 12 months.
  - **Deletion.** You can ask us to delete the Personal Information that we have collected from you.
  - **Opt-out of sales.** You have the right to opt-out of our sales of Personal Information.
- Nondiscrimination.** You are entitled to exercise the rights described above free from discrimination as prohibited by the CCPA.

**Exercising your right to information, access, and deletion.** You may submit requests to exercise your right to information, access, or deletion [here](#), calling us toll-free at **(800) 687 8605**, or via email to [privacy@ctd.ai](mailto:privacy@ctd.ai).

We will need to verify your identity to process your information, access, and deletion requests, and reserve the right to confirm your California residency. To verify your identity, we may require government identification, a declaration under penalty of perjury, or other information. We cannot

process your request if you do not provide us with sufficient detail to allow us to understand and respond to it.

Your authorized agent may make a request on your behalf upon our verification of the agent's identity and our receipt of a copy of a valid power of attorney given to your authorized agent pursuant to California Probate Code Sections 4000-4465. If you have not provided your agent with such a power of attorney, you must provide your agent with written and signed permission to exercise your CCPA rights on your behalf, provide the information we request to verify your identity and provide us with confirmation that you have given the authorized agent permission to submit the request.

**Notice of right to opt-out of the "sale" of your Personal Information.** We may share with Service users Personal Information collected from publicly available sources, data licensors, or other Service users in a manner that constitutes a "sale". You can request to opt-out of "sales" of your personal information [here](#) or by emailing us at [privacy@ctd.ai](mailto:privacy@ctd.ai).

**Shine the Light requests.** Under California's Shine the Light law (California Civil Code Section 1798.83), California residents may ask companies with whom they have formed a business relationship primarily for personal, family, or household purposes to provide the names of third parties to which they have disclosed certain personal information (as defined under the Shine the Light law) for their own direct marketing purposes during the preceding calendar year and the categories of personal information disclosed. You may send us requests for this information to [privacy@ctd.ai](mailto:privacy@ctd.ai). In your request, you must include the statement "Shine the Light Request," provide your first and last name and mailing address, and confirm that you are a California resident. Please note that we will not accept requests via telephone, mail, or fax, and we are not responsible for notices that are not labeled or sent properly, or that do not have complete information.

**Personal information that we collect, use and disclose.** The chart below summarizes the Personal Information we collect by reference to the categories of Personal Information specified in the CCPA (Cal. Civ. Code § 1798.140) and describes our practices currently and during the 12 months preceding the effective date of this Privacy Policy. The terms in the chart refer to the categories of information, sources, purposes, and third parties described above in this Privacy Policy in more detail. Information you voluntarily provide to us, such as in free-form webforms, may contain other categories of personal information not described below. In addition to the disclosures described in the chart below, we disclose Personal Information as described in the [How we share your personal information](#) section above.



Personal Information (PI) we collect	Source of PI	Business/commercial purpose for collection	Categories of third parties to whom we may “disclose” PI for a business purpose	Categories of third parties to whom we may “sell” PI
<p><b>Identifiers</b> (excluding online identifiers)</p> <ul style="list-style-type: none"> <li>• Contact data</li> <li>• Profile data</li> <li>• Email data</li> <li>• Invitee data</li> <li>• Public data</li> <li>• Licensed data</li> </ul>	<ul style="list-style-type: none"> <li>• You</li> <li>• Third-party sources</li> <li>• Enterprise customers</li> <li>• Other users of the Service</li> <li>• Other users of the Service</li> </ul>	<ul style="list-style-type: none"> <li>• Service delivery &amp; development</li> <li>• Marketing &amp; compliance protection</li> </ul>	<ul style="list-style-type: none"> <li>• Service providers</li> <li>• Payment processors</li> <li>• Third-party platforms</li> <li>• Professional advisors</li> <li>• Other Service users</li> </ul>	<ul style="list-style-type: none"> <li>• Other Service users</li> </ul>
<p><b>California Customer Records</b> (as defined in California Civil Code section 1798.80)</p> <ul style="list-style-type: none"> <li>• Contact data</li> <li>• Profile data</li> <li>• Email data</li> <li>• Transaction data</li> <li>• Communications</li> <li>• Marketing data</li> <li>• Financial data</li> <li>• User-generated content</li> <li>• Invitee data</li> <li>• Public data</li> <li>• Data about others</li> </ul>	<ul style="list-style-type: none"> <li>• You</li> <li>• Enterprise customers</li> <li>• Third-party sources</li> <li>• Other users of the Service</li> </ul>	<ul style="list-style-type: none"> <li>• Service delivery &amp; development</li> <li>• Marketing &amp; compliance protection</li> </ul>	<ul style="list-style-type: none"> <li>• Service providers</li> <li>• Payment processors</li> <li>• Third-party platforms</li> <li>• Professional advisors</li> <li>• Other Service users</li> </ul>	<ul style="list-style-type: none"> <li>• Other Service users</li> </ul>
<p><b>Commercial Information</b></p> <ul style="list-style-type: none"> <li>• Transaction data</li> <li>• Financial data</li> <li>• Marketing data</li> <li>• Online activity data</li> </ul>	<ul style="list-style-type: none"> <li>• You</li> <li>• Third-party sources</li> <li>• Automatic collection</li> <li>• Enterprise customers</li> <li>• Other users of the service</li> </ul>	<ul style="list-style-type: none"> <li>• Service delivery &amp; development</li> <li>• Marketing &amp; compliance protection</li> </ul>	<ul style="list-style-type: none"> <li>• Service providers</li> <li>• Payment processors</li> <li>• Third-party platforms</li> <li>• Professional advisors</li> </ul>	
<p><b>Financial Information</b></p> <ul style="list-style-type: none"> <li>• Transaction data</li> </ul>	<ul style="list-style-type: none"> <li>• You</li> <li>• Third-party sources</li> </ul>	<ul style="list-style-type: none"> <li>• Service delivery &amp; development</li> <li>• Marketing</li> </ul>	<ul style="list-style-type: none"> <li>• Service providers</li> <li>• Payment processors</li> </ul>	None

<ul style="list-style-type: none"> <li>Financial data</li> </ul>		<ul style="list-style-type: none"> <li>Compliance protection &amp;</li> </ul>	<ul style="list-style-type: none"> <li>Professional advisors</li> </ul>	
<p><b><u>Online Identifiers</u></b></p> <ul style="list-style-type: none"> <li>Device data</li> </ul>	<ul style="list-style-type: none"> <li>You</li> <li>Third-party sources</li> <li>Enterprise customers</li> <li>Automatic collection</li> <li>Other users of the Service</li> </ul>	<ul style="list-style-type: none"> <li>Service delivery &amp;</li> <li>Research development &amp;</li> <li>Marketing &amp;</li> <li>Compliance protection &amp;</li> </ul>	<ul style="list-style-type: none"> <li>Service providers</li> <li>Payment processors</li> <li>Third-party platforms</li> </ul>	
<p><b><u>Internet or Network Information</u></b></p> <ul style="list-style-type: none"> <li>Marketing data</li> <li>Device data</li> <li>Online activity data</li> </ul>	<ul style="list-style-type: none"> <li>Automatic collection</li> </ul>	<ul style="list-style-type: none"> <li>Service delivery &amp;</li> <li>Research development &amp;</li> <li>Marketing advertising &amp;</li> <li>Compliance protection &amp;</li> </ul>	<ul style="list-style-type: none"> <li>Service providers</li> <li>Payment processors</li> <li>Professional advisors</li> </ul>	
<p><b><u>Inferences</u></b></p> <p>May be derived from any other category of personal information</p>	N/A	<ul style="list-style-type: none"> <li>Service delivery &amp;</li> <li>Research development &amp;</li> <li>Marketing advertising &amp;</li> <li>Compliance protection &amp;</li> </ul>	<ul style="list-style-type: none"> <li>Service providers</li> <li>Professional advisors</li> <li>Other users</li> </ul>	<ul style="list-style-type: none"> <li>Other Service users</li> </ul>
<p><b><u>Professional or Employment Information</u></b></p> <ul style="list-style-type: none"> <li>Profile data</li> <li>Public data</li> <li>Licensed data</li> </ul>	<ul style="list-style-type: none"> <li>You</li> <li>Third-party sources</li> <li>Automatic collection</li> <li>Enterprise customers</li> <li>Other users of the service</li> </ul>	<ul style="list-style-type: none"> <li>Service delivery &amp;</li> <li>Research development &amp;</li> <li>Marketing &amp;</li> <li>Compliance protection &amp;</li> </ul>	<ul style="list-style-type: none"> <li>Service providers</li> <li>Professional advisors</li> <li>Other Service users</li> </ul>	Other users
<p><b><u>Audiovisual Information</u></b></p> <ul style="list-style-type: none"> <li>Profile data</li> </ul>	<ul style="list-style-type: none"> <li>You</li> <li>Third-party sources</li> </ul>	<ul style="list-style-type: none"> <li>Service delivery &amp;</li> <li>Research development &amp;</li> <li>Marketing advertising &amp;</li> <li>Compliance protection &amp;</li> </ul>	<ul style="list-style-type: none"> <li>Service providers</li> <li>Professional advisors</li> <li>Other Service users</li> </ul>	None