PARTNERTAP GUIDE

Security & Privacy

PARTNERTAP

Introduction

Thank you for your interest in PartnerTap. Our company's mission is to help you drive more revenue with your partners. The business of partnering requires data sharing on a large scale which requires stringent security protocols.

Protecting your data is of utmost importance to our team at PartnerTap. We work tirelessly to protect your data as well as all of your partner's data. This document was designed to give you an overview of all of our security processes and policies.

Every partnership is unique, and it's for this reason that we have custom sharing controls. Both partners control how much or how little they share through PartnerTap. Not only do we give you complete control of what information you share in PartnerTap, we also comply with industry-standard security protocols like SOC 2 Type II, GDPR and CCPA.

We hope this document will give you a better understanding of PartnerTap's security policy and how we protect your most sensitive information. You can follow up with us directly on any questions related to the information in this document.

Cassandra Gholston

CEO, PartnerTap

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Our Security Posture

Our highest priority is the security and availability of customer data. We strive to deliver a cutting edge solution in the most secure and expedient way possible, using modern cloud facilities and automation. PartnerTap is a SOC 2 Type II compliant organization. We harden our infrastructure and software in the following ways:

- Hosted on SOC 2, HIPAA, GDPR and HiTrust compliant cloud providers
- Network design and isolation
- Static code analysis
- Test automation
- Encryption at rest and transit
- Strict deployment procedures
- Intrusion detection
- Vulnerability scan system
- Third party penetration testing
- Business continuity and disaster recovery
- SOC2 Type II audits

SOC 2 Type II

We take SOC 2 very seriously. It provides an industry standard template for keeping our organization and our client's data secure. A SOC 2 Type 2 report is an internal controls report capturing how PartnerTap safeguards client data, and how well those controls are operating. We maintain this compliance through our security team and annual audits by a certified third-party CPA.

Our SOC 2 Type II report is available upon request.

Securing Data

Client data is secured with a combination of HR and technical policies that form a framework of security and privacy. Data is always encrypted in transit and at rest using TLS 1.2 and the AES 256 algorithm.

Privacy

PartnerTap is committed to the responsible use of information and protecting individual privacy rights. PartnerTap protects customer privacy through the design of its products, monitoring, and auditing its hosting Infrastructure as appropriate, and through other information security safeguards.

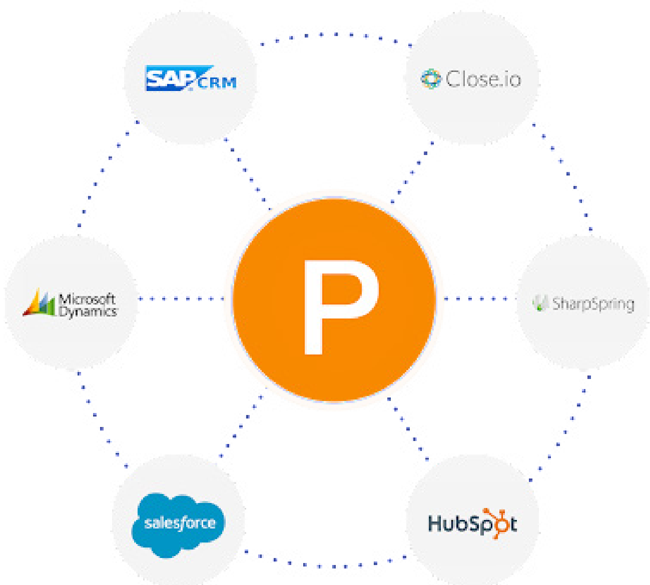
OUR PRIVACY OBJECTIVES

1. Limit storage of personally identifiable information (PII) and sensitive personally identifiable information (SPII) to only what is absolutely necessary
2. Secure PII, including SPII, collected, maintained, used or disseminated in connection with the services offered by PartnerTap or by its affiliates.
3. Strive to protect PII that PartnerTap maintains or disseminates through the use of appropriate administrative, physical, and technical safeguards, so it is not obtained by unauthorized individuals or used inappropriately.

Data Sources & Synchronization

Data Sources

PartnerTap integrates with multiple sources of data. We integrate directly with CRMs like Salesforce, HubSpot, Fresh Sales, SharpSpring, Close.io, and others to ensure efficient and performant synchronizations. We also support the import of both company accounts and partner accounts via our spreadsheet import wizard.



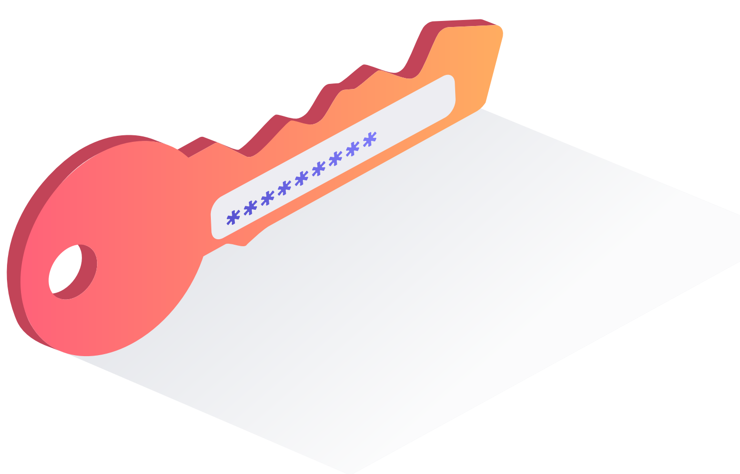
No matter what the data source, we provide an ability to import any number of custom fields to make analytics and reporting more effective. Even after syncing your data, none of that is shared until the user chooses the proper share settings within PartnerTap.

How We Match

We built PartnerTap, to help channel and sales teams map accounts quickly and pinpoint the right accounts to target. This is a multi-step process that results in high-quality data matching. In order to give you accurate matches, PartnerTap first normalizes your data set, which improves the quality of account matches. After normalization, the data is then mapped. To perform a match, our software looks through multiple objects such as:

- Account Name
- DUNS
- Website
- Sic Codes
- Phone Number
- Address
- City & State
- VAT ID
- Country
- Custom Fields

PartnerTap also takes fuzzy matching into consideration. Meaning, that it is possible to map based on similar but not exact account information. So, if the account name is misspelled in any party's data, the software will show a partial match. It will also match data with just a single field such as the customer's address or any other custom variable. We also have an auditing team that validates all of your mapped data upon your request.

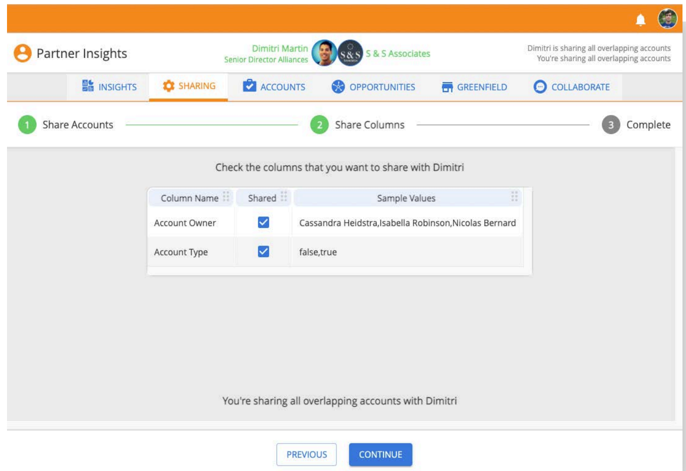


CRM Authentication

If a CRM provides an OAuth API that is what we use for authentication and authorization when syncing client accounts. This allows the client to control what data is accessible to PartnerTap. If OAuth is not available an API key is encrypted and stored in the client's organization configuration.

Object Types

For the sake of simplicity we use Salesforce object names, although they might be named differently in other CRMs. PartnerTap focuses on the following object types: Account, Opportunity, Leads, Product, and Campaign. Account access is required, but all other objects are optional. A detailed description of the fields we sync for each object type will be provided during implementation discussions. Revenue and contact information is never synced unless requested directly from a client.



CRM Read/Write

Out of the box PartnerTap is a one-way sync, read-only. PartnerTap does not create Account or Opportunity records. In some configurations we create activity entries on the Account object, but this is optional.

CRM Synchronization

CRM data is synchronized on a weekly basis (configurable). Our CRM integrations are optimized to minimize impact on any API limits your CRM might have.

Salesforce Managed Package

Another optional aspect of our CRM integration is the PartnerTap Connect for Salesforce managed package. PartnerTap Connect allows our clients to push mapped partner account information into Salesforce so that it can be referenced on the Account for reporting and sales activity. PartnerTap Connect is a simple package that contains only a custom object, dashboard and reports.

Roles & Data Sharing

Roles

PartnerTap controls access to reports and analytics based on customizable roles and the permissions assigned to those roles. Roles range from administrative access, where the user can see data across an organization to the fine grained access of an individual contributor that should only see the data that has been assigned to that user.

Roles and permissions are customizable to best fit a client's needs.

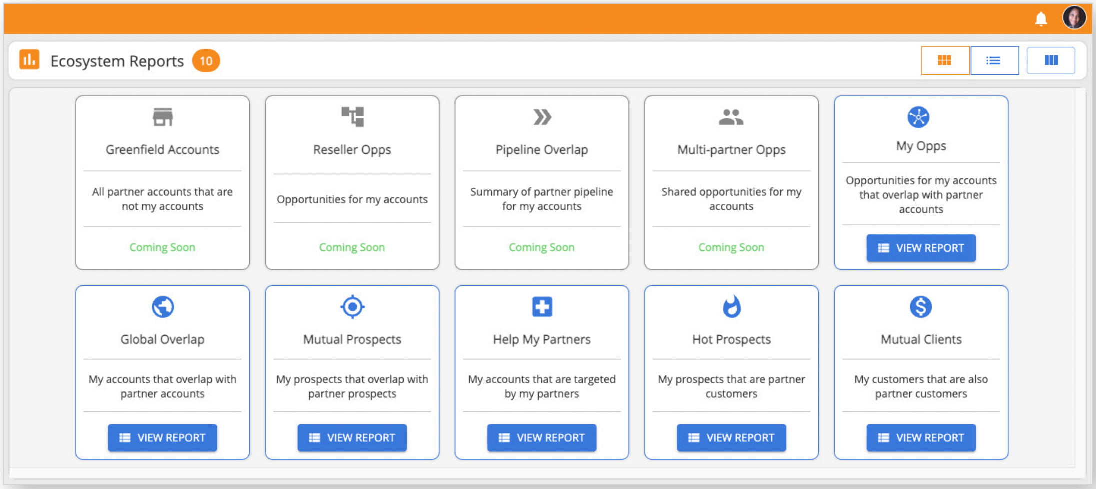
Partnerships

Partnerships are created, accepted or denied by individual users on the PartnerTap platform. Partnership availability can be controlled at a client level to prevent unwanted partnership creation (e.g. competitors). Once a partnership is created, each partner needs to select the desired sharing rules for that specific partnership.

Reporting

Within Partnertap you can find a series of prepackaged reports that aggregate your data for you. These reports help you to find the specific information or overlap that you need to work with your partners.

There is also the ability to customize your own reports so that they fit your specific needs in each of your specific partnerships. All reporting is limited by what you and your partner choose to share with one another. Your data is always protected according to what your preferences are.



Account & Partner Exclusion

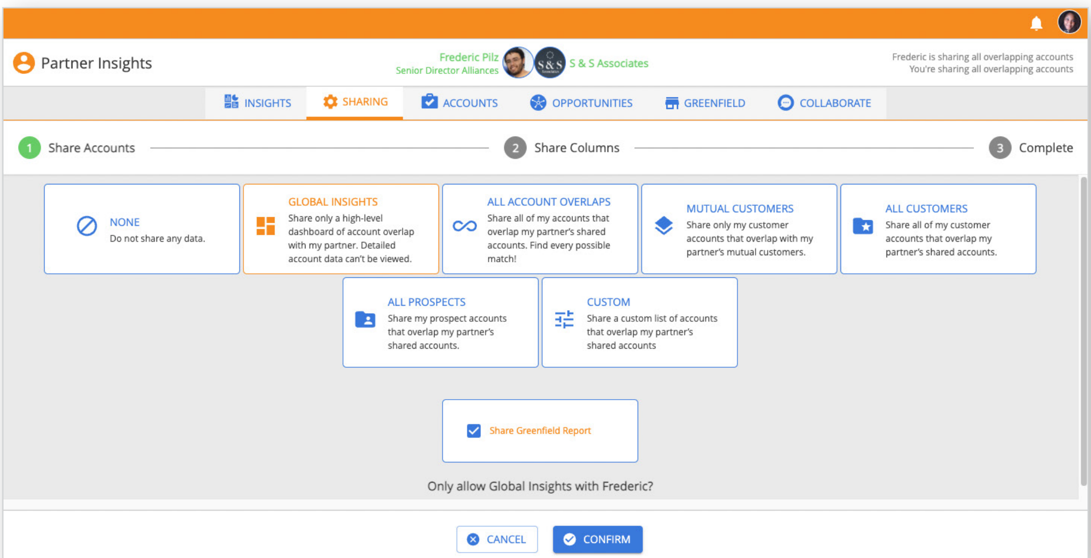
Once your accounts are either synced using your CRM or uploaded manually, we can then set up an account ownership model in PartnerTap based on your specific CRM account ownership rules. This process also includes creating:

Account Exclusion: if you need to prevent certain accounts from being synced into PartnerTap

Organization Exclusion: if you have specific competitors or organizations you want to block from interacting with your users

Data Sharing Rules

Share settings control the data that is available for mapping with a partner. Details about an account are only shared on mapped accounts. The user and partner must map or match on the account before data is shared on both sides of the partnership.



Global Insights

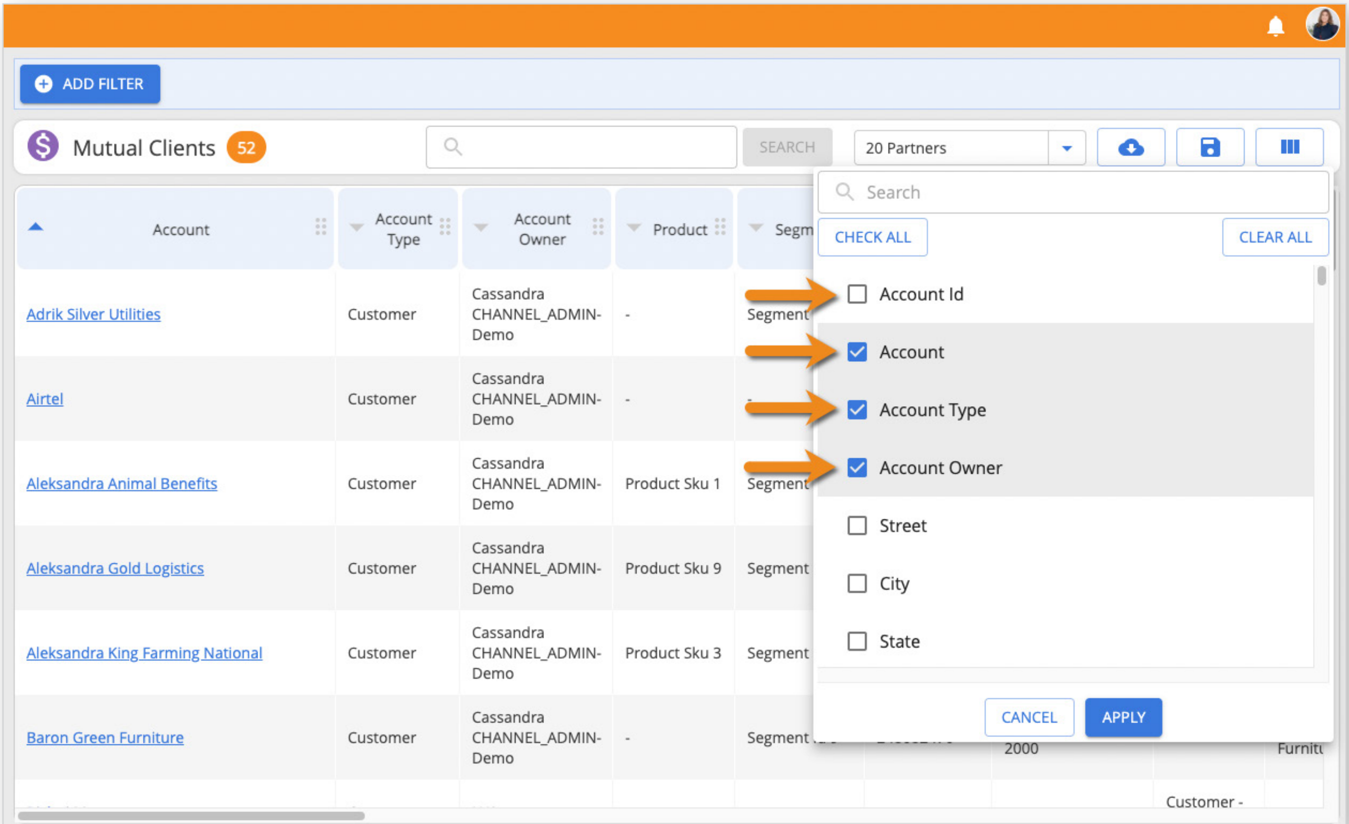
A default limited data sharing rule is applied for all new partnerships called “Global Insights”. This allows partners to review potential overlap before deciding to share specific account and opportunity information.

Share Type

When a partner has decided they would like to share detailed account and opportunity information, they can choose from pre-configured or custom sharing rules. Pre-configured sharing rules range from very restrictive to very open. Some examples: “Mutual Customers”, “All Prospects”, “All Customers”, and “All Accounts”. Pre-configured sharing rules can be created for specific clients if needed. Custom sharing rules can be configured to use whatever field desired using our sharing rule configuration tool. This allows for a set of filters to be created by the user and see a preview of the shared data set before sharing.

Column Sharing

Sharing rules limit the rows that are available for mapping with a partner, column sharing rules limit the fields or columns that are shared on each of those rows. A user can choose to share from a finite list of pre-approved columns. This list of columns is customizable for each client.



Legal

User Agreement

Please refer to our [User Agreement] for our default user agreement. If you decide to do business with PartnerTap, a customized agreement can be created and will supersede our default user agreement.

Privacy Policy

Please review our [Privacy Policy] that outlines in detail how we handle your sensitive information. If you engage with PartnerTap as a client any custom privacy policy will supersede our default privacy policy.

Conclusion

PartnerTap was created to help Enterprise Companies partner better by driving more revenue with each of their partners. We offer a superior account mapping platform with the highest possible security protocols.

Our robust security measures protect PII and all sensitive data from our customers. We follow industry standards like CCPA, GDPR and we are SOC 2 Type II compliant.

We give our customers full control over what they allow their partners to see, adding an extra layer of security to your account mapping practices. Every aspect of mapping, reporting, and sharing is protected by our team and our practices, so you can safely share data with your partners.

Your data is safe and protected with us. Please reach out to us directly with any questions or security concerns you may have.