

Privacy Policy

Learn how we protect your business information

Effective Date: June 1, 2021

Sage Intacct, Inc. (“we,” “us,” or “our”) provides cloud accounting software-as-a-service to organizations. We collect, use and disclose information for the purpose of marketing and selling to businesses and other organizations and not individuals. To the extent we process personal information about you as an individual, it is for the purpose of marketing and selling to the organization which employs you.

This privacy policy describes how we collect and use the personal information you provide to us or that we collect when you:

- Visit our websites, like www.sageintacct.com, that link to this privacy policy
- Receive communications from us, including emails, video conferences, phone calls and product demonstrations
- Register for, attend or take part in events organized by us
- Provide information at third-party conferences sponsored or attended by us
- Complete our surveys

This privacy policy also describes the choices available to you regarding our use of your personal information and how you can access and update this information. We will share your personal information with third parties only in the ways that are described in this privacy statement.

For information on the use of information collected from you as a user, administrative contact or billing contact for the Sage Intacct cloud-based accounting software-as-a-service, please see our product privacy policy located at www.sageintacct.com/privacy_policy_full.php. For information on the use of information collected through the Sage Group plc corporate website, please see Sage's Privacy Notice located at <https://www.sage.com/en-us/legal/privacy-and-cookies/>. If you are considering applying for a job with Sage Intacct, currently work for Sage Intacct, or have worked for Sage Intacct, then the Sage Group plc [HR Privacy Notice](#) applies to information we collect or collected as a part of those relationships.

Information Provided by You

Business contact information

Representatives of prospective customers may provide their business contact information by filling out forms on our websites or by registering for, or providing their contact information at, a conference or Sage Intacct event. Specifically, we collect demographic and contact information, such as first and last name, title, company name, address, business phone number, business e-mail address, and professional association from visitors and representatives of prospective customers who wish to receive information about Sage Intacct and its products and services.

We use this information:

- To provide you and the prospective customer you represent with information about the products and services that we provide;
- To send you information regarding Sage Intacct or its partners, such as newsletters, promotions, and events;
- To conduct market and product research;
- To conduct surveys and for marketing or product development purposes, for example, to assess the needs of the industries that we serve; and

- To manage event registrations and attendance, including communicating with you about the event.

Sage Intacct advocates

If you choose to use our referral service to tell a colleague about our offering, or if you use one of our service provider's content delivery platforms to share information that we have provided to you, we will ask you for your friend's name, email address, and phone number. We will automatically send your friend a one-time email inviting him or her to visit our website or to view the information you would like to share on the content delivery platform where the information is stored and managed. Sage Intacct uses your friend's information for tracking the success of our referral program and to analyze how our promotional information is used and by whom.

We may also use referral information as described above under "Business contact information." Your friend may contact us via the methods listed in "Contact Us" below to request that we remove this information from our database.

Audio and video information

With your knowledge and consent where required, we may record phone or video conversations between you and our sales personnel that include your voice and likeness.

We use this information to provide you and the business that you represent with information about the products and services that we provide, to assess the compliance, quality and effectiveness of our sales and marketing efforts, and for training purposes.

Information Collected by Us

We use the information that we collect under this section "Information Collected by Us" to find and contact prospective customers, market and sell to them, verify contact information, conduct market and product research, manage partnerships with resellers

and marketplace partners, and to assess and improve the effectiveness of our sales and marketing efforts.

Personal information obtained from third party sources

We collect lead information from third party vendors, social media sites or through publicly available information. From time to time, we may also obtain lead information from our resellers or joint marketing partners, for example, when they register or refer a lead to us. Lead information includes the business contact information described above under "Business contact information".

Cookies and other tracking technologies

As part of our marketing and selling operations, Sage Intacct and our service providers use cookies or similar tracking technologies that collect information about website visitors' behavior on our website and the content they consume.

Users can control the use of cookies at the individual browser level. If you configure your web browser to reject cookies, you may still use our site, but your ability to use some features or areas of our site may be limited.

These technologies are used in analyzing trends, administering our websites, tracking and analyzing users' movements around the site and to gather demographic information about our user base as a whole. We may receive reports based on the use of these technologies from our service providers on an individual as well as aggregated basis. We use cookies to improve our website and emails by seeing which areas and features are most popular, to count the number of computers accessing our website, to personalize and improve your experience, and to record your preferences.

Emails that we send to you through our service providers may contain tracking technologies that enable us to determine whether you opened our email and whether and to what extent you engaged with content associated with the email. You can opt

out from our marketing messages by clicking on the “unsubscribe” link included in them.

In addition, we use sales tools that use cookies or other tracking technologies to tailor and assess the effectiveness of our sales and product demonstrations.

Log files

As is true of most websites, we use a third party tracking-utility partner to gather certain information automatically and store it in log files. This information includes Internet protocol (IP) addresses, browser type, Internet service provider (ISP), referring/exit pages, operating system, date/time stamp, and clickstream data.

We use this information to analyze trends and to help us improve your experience on our website.

Disclosure of Information

Service Providers and Partners

- We contract with service providers to provide services or functionality to us for our business purposes, such as IT, telephony and system administration and hosting, research and analytics, marketing, sales, customer support and data enrichment. If we do so, we may share personal information with these service providers or obtain personal information from them. In such cases, we will require such providers to maintain the confidentiality of your information that we share and to use it only for the purposes of their engagement by us. In addition, use of our service providers’ services may generate data (for example, log data or aggregated usage data) that we do not input into these services and over which we have no control. These types of usage data are typically subject to the privacy policies of the applicable service provider.

- We may share information about prospective customers for marketing purposes with resellers and joint marketing partners. This information may include the business contact information of employees of such prospective customers. Resellers and joint marketing partners may use this business contact information to market and sell Sage Intacct services and/or the partners' offerings to the prospective customer.
- We may disclose information you provide or that we collect to professional advisors such as lawyers, bankers, auditors and insurers.

Affiliates

We may disclose the information you provide or that we collect to our affiliates (other companies within the Sage group of companies) for marketing or sales purposes.

Event sponsors

If you attend an event or webinar organized by us, we may share your business contact information with sponsors of the event. If required by applicable law, you may consent to such sharing via the registration form or by allowing your attendee badge to be scanned at a sponsor booth. In these circumstances, your information will be subject to the sponsors' privacy statements. If you do not wish for your information to be shared, you may opt-out by contacting us via the methods listed in "Contact Us" below or not allowing scanning of your badge.

Disclosures by law

We reserve the right to disclose your personally identifiable information as required by law, such as to comply with a subpoena, or similar legal process, and when we believe in good faith that use or disclosure is necessary to protect our rights, protect your safety or the safety of others, investigate fraud, or respond to a government request.

Disclosures in connection with a corporate transaction

Our website includes social media features, such as the Facebook button, and widgets, such as the “share this” button. These technologies may collect your IP address, which page you are visiting on our site, and may set a cookie to enable the feature to function properly. Social media features and widgets are either hosted by a third party or hosted directly on our website. Your interactions with these features are governed by the privacy policy of the company providing it.

Links to other sites

Our website includes links to other websites whose privacy practices may differ from those of Sage Intacct. If you submit personal information to any of those sites, your information is governed by their privacy statements. We encourage you to carefully read the privacy statement of any website you visit.

Data Retention

We will retain your business contact information as is needed to provide services to the business that you represent, or, if your business does not become a customer, for seven years. We may retain and use your information for a longer period if it is necessary to comply with our legal obligations or to resolve disputes.

Individual Rights

Access to personally identifiable information

Upon request we will provide you with information about whether we hold any of your personal information. If you wish to correct, update or request the deletion of personally identifiable information provided to us you may also contact us using the information below. We will respond to your request to access in accordance with the timeframes required by law, or if there are no applicable requirements, within 45 days.

As an individual, you have the following rights pursuant to laws that may apply to you or us, such as the General Data Protection Regulation (GDPR):

- to be told how your information is used and obtain access to your information;
- to have your information rectified or erased or place restrictions on processing your information;
- to object to the processing of your information (e.g., for direct marketing purposes or where our use is based on legitimate interests);
- to have the digital information you provided and which we process on the basis of your consent or a contract with you returned to you in a structured, commonly used and machine-readable format, or sent directly to another company, where technically feasible (“data portability”);
- not to be subject to a decision based on the automated processing of your personal data, including profiling;
- where processing of your information is based on your consent, to withdraw that consent at any time;
- to file a complaint with the applicable supervisory authority responsible for data protection matters.

If the California Consumer Privacy Act (CCPA), applies to you as an individual (a “consumer” under the CCPA), you have the following rights, if you submit a verifiable consumer request:

- To receive disclosure of:
 - the categories of personal information that we have collected about you;
 - the categories of sources of the personal information we have collected about you;
 - the business or commercial purpose for our collecting of personal information about you;

- the categories of third parties with whom we share your personal information, including categories of third parties to whom we sell personal information or disclose personal information for a business purpose; and
 - the specific pieces of personal information that we have collected about you.
- To request deletion of your personal information by us, subject to the exceptions provided by the CCPA;
- To be free of discrimination on the basis of having exercised your rights under the CCPA.

Please see “Information Provided by You” and “Information Collected by Us” above for a description of the specific pieces of personal information we may collect about individuals and the business and/or commercial purposes for which the personal information is used.

The personal information we collect falls into the following categories under the CCPA’s definition of “personal information”:

- Personal identifiers (e.g., name, email, etc.),
- professional information (e.g., title),
- internet activity information of users (e.g., your navigation around our website and engagement with our website or email content),
- audio and visual information (e.g., when we record a telephone call) and
- inferences drawn from the foregoing information (e.g., we may assign scores to the actions that you take on our website that we may use in connection with other information to assess the likelihood that the business you represent will purchase our products and services).

We obtain this data either directly from you, from your interaction with our website (including portions of our website that are hosted by our service providers) and marketing emails, from third party vendors from whom we purchase lead data, or through our internal research efforts. As a business covered by the CCPA, we do not sell consumers' personal information. In the preceding 12 months, we have disclosed for a business purpose the categories of personal information that we collect that are listed above. Please refer to "Disclosure of Information" above for the categories of third parties with whom we share personal information and "Third Parties" for categories of third parties that receive personal information when you visit our websites.

Changes to this policy

We may update this privacy statement to reflect changes to our information practices. If we make any material changes we will notify you by means of a notice on this site prior to the change becoming effective. We encourage you to periodically review this page for the latest information on our privacy practices.

Contact us

You may direct questions regarding our website privacy policy to [privacy.intacct\[@\]sage.com](mailto:privacy.intacct[@]sage.com) or, by telephone, to Sage Intacct's customer support staff at 877-704-3700 or via postal mail at 300 Park Avenue, Suite 1400, San Jose, CA, 95110. If you wish to exercise your rights under the CCPA, you may also complete the form available [here](#).