

# Cloud Pricing Original, Cloud Pricing 2.0 and Proposal Builder – Privacy Policy

Thank you for using Cloud Pricing Original, Cloud Pricing 2.0 and/or Proposal Builder. This policy explains the what, how and why of the information we collect when you visit our website ([www.pricinginthecloud.com](http://www.pricinginthecloud.com)), or when you use our software. It also explains the specific ways we use and disclose that information.

Your privacy is very important to us. We have put in place measures to ensure that any personal information or data that we obtain from you is processed in accordance with the accepted principles of good information handling.

We take your privacy extremely seriously and we never sell your details.

## **Definitions**

When we say ‘we’, ‘us’ or ‘our’ we are referring to either Cloud Pricing Original, Cloud Pricing 2.0 or Proposal Builder. Cloud Pricing Original and Cloud Pricing 2.0 is software designed and created by Mark Wickersham, FCA for the purpose of agreeing a value-based price with customers, and Proposal Builder is an add-on feature to Cloud Pricing 2.0 which can be used to create proposals to send to client for digital signature and to track tasks and profitability.

When we say ‘user’ we are referring to the person who is registered for an account within either of Cloud Pricing Original, Cloud Pricing 2.0 or Proposal Builder (i.e. the individual accountant/bookkeeper or person acting on behalf of an accounting/bookkeeping firm).

When we say ‘your account’ we mean your active subscription.

When we say ‘the software’ or ‘our service’ we mean Cloud Pricing Original, Cloud Pricing 2.0 or Proposal Builder.

When we say ‘personal information’ we mean any information that identifies or can be used to identify you directly or indirectly, including but not limited to title, first and last name, address, email address or other demographic information.

## **Scope**

This policy is effective with respect to any data that we have collected, or collect, about - and/or - from you.

## **Contact information for complaints, questions and concerns**

If you have any complaints, questions or comments about this policy, or if you want to update, delete or change any personal information we hold, or you have a concern about the way in which we have handled any privacy matter, please send us a message at [support@wickersham.co.uk](mailto:support@wickersham.co.uk). Information provided by you via general email enquiries to us, such as your email address, is used only to respond to your inquiries in the ordinary course of business and is never shared with any third parties.

## **Use of information**

As a general policy, no personally identifiable information, such as your name, address, or email address is automatically collected from your visit to our site. However, certain non-personal information is recorded by the standard operation of our internet servers. Information such as the type of browser being used, its operating system, and your IP address may be gathered in order to enhance your online experience.

## **Information We Collect**

If you subscribe to use the software, we will use your details to facilitate your registration and future transactions.

If you send us an enquiry or details via email or another method including 'contact us' for assistance, we will use your details to respond to any request/comment you have.

When you browse our website, sign up for an account and use the software, send us an email, post on our site, integrate the software with a third-party site (such as QBO) or communicate with us in any way, you are voluntarily giving us information that we collect.

That information may include your name, email address, physical address, phone number, credit card information, password details, as well as other demographic information.

Information submitted at the time of submission will be used by us only as necessary for our legitimate business interests, including without limitation the improvement of our products, services and the contents of our site. Personally identifiable information is never sold or leased to any third parties. With your permission, we may use your contact information to send you information about our company and products. You may always opt-out of receiving future mailings as provided below.

By giving us this information, you consent to it being collected, used, disclosed and stored by us.

Some information, such as information obtained through your use of the software, may be collected as part of log files or other types of files associated with your account, as well as through the use of cookies or other tracking technology.

## **Use and Disclosure of Personal Information**

We may use and disclose personal information only for the following purposes:

- a) To promote use of our software to you and others

If we collect your personal information when you visit our website and do not sign up for any of our services, we may send you an email inviting you to sign up. If you use any of our services and we think you might benefit from using another service we offer, we may send you an email about that. You can stop receiving our emails by

clicking on the 'unsubscribe' button at the foot of all our emails. In addition, we may use information we collect in order to advertise our services to you or suggest an additional feature of our service that you might consider using.

- b) To send informational and promotional content – you can stop receiving our promotional emails by clicking on the 'unsubscribe' button at the foot of all our emails.
- c) To bill and collect money – this includes sending you emails, invoices, receipts and alerting you if we need a different credit card number. We use third parties for secure credit card transaction processing, and we send billing information to those third parties to process your orders and credit card payments.
- d) To send system alert messages which will inform you of any temporary or permanent changes to our service, such as new features, version updates and changes to our Privacy Policy.
- e) To communicate with users about their account and provide customer support.
- f) To provide, support and improve the service we offer, which may include sharing your information with any third parties to help improve our service. If we do share any personal information with third parties, we take steps to protect your information by ensuring that they use the information we give them in a manner consistent with this policy.
- g) To provide suggestions to you, including offering recommendations of other information you may be interested in or that may be relevant to you.
- h) We may disclose user information in special cases when we have reason to believe that disclosing this information is necessary to identify, contact or bring legal action against someone who may be causing injury to or interference (either intentionally or unintentionally) with our rights or property, other users of the software, or anyone else that could be harmed by such activities.

## **Data Collected for and by our Users**

If you have an active account within our software, you may import into that account personal information that you have collected from your own customers or other individuals (such as other members of your team who have been added as additional users to use the software with your customers). We have no direct relationship with your customers or any other person other than you, and for that reason you are responsible for making sure you have the appropriate permission for us to hold that information in the software.

## **Links to External Sites**

We are not responsible for the content or practices of third party websites that may be linked to the software or to our website. We are also not responsible for any information

that you might share with such linked websites. You should refer to each website's respective privacy policy and practices prior to disclosing any information.

## **Public Information and Third-Party Websites**

### **Kajabi**

Our online video training programme and written User Guides are hosted in a video training course on a platform called Kajabi.

As Kajabi is an external third-party website, they will have their own Privacy Policy and if you are concerned about how they use your personal information, we encourage you to read their policy to ensure you are comfortable with it.

Each of the videos in our online video training programme contains a 'Comments' section where you may post comments or ask questions. Users should be aware that when they voluntarily disclose personal information (e.g., user name, email address or other personal information) in comments or posts, that information can be collected and used by others and may result in unsolicited messages from other people. You are responsible for the personal information you choose to submit in these instances. Please take care when using these features.

If your personal information appears in a comment in our training programme, and you want it removed, contact us at [support@wickersham.co.uk](mailto:support@wickersham.co.uk).

### **Facebook**

We have a private Facebook group which users of the software are invited to join in order to share best practice. Any information, communication or materials you submit to us via this social media platform is done at your own risk.

Users should be aware that when they voluntarily disclose personal information (e.g., user name, email address or other personal information) in posts, that information can be collected and used by others and may result in unsolicited messages from other people. You are responsible for the personal information you choose to submit in these instances. Please take care when using these features.

As Facebook is an external third-party website, they will have their own Privacy Policy and if you are concerned about how they use your personal information, we encourage you to read their policy to ensure you are comfortable with it.

### **Links to third-party websites** (such as Stripe):

When you make a payment in Cloud Pricing 2.0, you may provide **payment information** such as your payment card or other payment details. We use Payment Card Industry compliant third-party payment services and we do not store any credit card information we may receive in regard to a specific transaction and/or billing arrangement

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except as necessary to complete and satisfy the rights and obligations with regard to such transaction, billing arrangement, and/or as otherwise authorised by a user.

This third-party will have a different Privacy Policy to ours, so if you are concerned about how they use your personal information, we encourage you to visit their website and read their policy to ensure you are comfortable with it.

## **Third Parties (developers)**

It may sometimes be necessary for us to share your personal information with our software developers – this could be because you are encountering problems when using the software.

The developers are required to use your personal information only for the provision of services to you/us and in a manner that is consistent with this policy.

## **Security**

Security for all personally identifiable information is extremely important to us. Unfortunately, no data transmission over the internet can be guaranteed to be 100% secure. As a result, while we strive to protect your personal information, we cannot ensure or warrant the security of any information you transmit via the internet. By transmitting any such information to us, you accept that you do so at your own risk.

## **Microsoft Azure**

All of the data for the software is held in Azure Cloud, a secure infrastructure within a Microsoft Azure data centre. While data is in transit to and from the database it is encrypted under 256bit SSL. The database is behind a firewall to prevent unauthorised 3rd party intrusion and external admin access is thereby granted only to specific IP addresses. Users passwords are encrypted using SHA256 Encryption.

Microsoft only use customer data to provide services agreed upon and they do not mine it for marketing or advertising purposes.

Microsoft have their own Privacy Policy and if you are concerned about how they use your personal information, we encourage you to read their policy to ensure you are comfortable with it.

## **General**

Where we have given you (or where you have chosen) a password which enables you to access your account, you are responsible for keeping this password confidential. We ask you not to share a password with anyone.

However, in certain circumstances, we may ask you to disclose your password to us (for example, if you are experiencing a problem within your account, we may request your log in

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details so that we can investigate directly to resolve the issue). In these cases, once the problem has been resolved, your password details are deleted. As an added measure of security, you can also log into your account and change the password, should you wish to do so.

You have the right to request a copy of the personal information we hold about you, it's origin and any recipients of it, as well as the purpose of any data processing carried out.

**Choice/Opt-Out:** we may provide you the opportunity to opt-in to receive communications from us at the point where we request information about you. You always have the option of removing your name from any email list in order to discontinue any such future communications. In order to ensure immediate removal from any list, please follow the specific instructions set forth within the communications you receive from us which you no longer wish to receive. If you are unsuccessful in completing the instructions specified in any such communication, please email us at [support@wickersham.co.uk](mailto:support@wickersham.co.uk), including a copy of the undesired email attached to the request, and state you wish to be removed from the mailing list.

In accordance with the Data Protection Act 1998, you have the right to correct, restrict our use of or ask us to delete your personal information. Email [support@wickersham.co.uk](mailto:support@wickersham.co.uk) to ask any questions or request the correction, restriction or deletion of your personal information.

## **Changes to the Privacy Policy**

We may change this Privacy Policy at any time. The most recent version of the policy is reflected by the version date located at the bottom of this document. All updates and amendments are effective immediately upon notice, which will be given by an announcement within the software or via email. We encourage you to regularly review the policy as your continued use of the software signifies your continuing consent to be bound by this policy.

## **Your Acceptance of These Terms:**

By using our site, you accept the policies and restrictions set forth in this Privacy Policy. If you do not agree to this policy, please do not use our software or visit our websites.