



CAI Software Privacy Notice

Last updated on: September 9, 2026

Introduction

Privacy is an important part of CAI's ongoing commitment to our customers, partners, and users. As CAI continues to integrate and modernize its products, brands, and digital experiences, we are also working to strengthen our privacy governance program and improve the clarity and consistency of our privacy disclosures.

We have prepared this Privacy Notice to provide a consolidated explanation of our current privacy practices. We expect to review and update this Privacy Notice periodically as we continue our privacy and data governance efforts. If you would like additional information about how your Personal Data is used, please contact us. We welcome questions and are committed to helping individuals understand how their information is handled.

Who We Are

CAI Software, LLC and its affiliates listed below (collectively "CAI", "we", "us", "our") provides software, technology, support, professional services, and related solutions to businesses across a variety of industries. This Privacy Notice applies to CAI Software and the affiliated brands, websites, products, services, and digital experiences that link to or reference this Privacy Notice, including, Alterity (Acctivate), Graphic Communications, Mar-Kov, Maritech, Parsable, PlanetTogether, LLumin, Print ePS, Radley, and xTuple.

Depending on how you interact with us, CAI may process Personal Data on its own behalf (as a "data controller" or "business") or on behalf of our customers (as a "data processor" or "service provider"). When CAI processes Personal Data on behalf of a customer, that customer's privacy notice may also apply to the processing of your information.

Who This Notice Covers

This Privacy Notice applies to individuals whose Personal Data we collect or process when they:



- Visit our websites;
- Use our products, services, customer portals, or applications;
- Request information, support, or services from us;
- Register for events, webinars, or other activities we sponsor;
- Subscribe to marketing or other communications from us;
- Interact with us as customers, prospective customers, partners, resellers, vendors, or business contacts; or
- Otherwise engage with CAI and the affiliates / brands covered by this Privacy Notice.

This Privacy Notice also applies to Personal Data that we receive from third parties, business partners, and service providers in connection with our business operations.

What This Notice Does Not Cover

This Privacy Notice does not apply to:

- Job applicants, employees, contractors, directors, officers, or other personnel of CAI, whose Personal Data is subject to separate privacy notices;
- Personal Data processed solely on behalf of our customers where we act as a service provider or processor and the customer's privacy notice governs the processing; or
- Information that does not identify, relate to, describe, or reasonably link to an individual.

How We Use Personal Data

The Personal Data we process will vary depending on the nature of our relationship with you, how you or your organization interact with CAI, the products and services involved, the choices you make when engaging with us, and the ways in which we obtain information about you.

Personal Data We May Collect

Depending on the circumstances, we may collect:

- Contact information, such as your name, email address, telephone number, mailing address, and business address;
- Professional and business information, such as your job title, company name, industry, or business interests;



- Account and authentication information, such as usernames, passwords, and account preferences;
- Information you provide when requesting support, communicating with us, or interacting with our customer service teams;
- Information submitted through forms, event registrations, surveys, customer portals, or other interactions with us;
- Transaction and relationship information, including products or services you use, purchase, or express interest in;
- Device, network, and usage information, such as IP address, browser type, operating system, language preferences, approximate geographic location, and information regarding your use of our websites, applications, products, and services;
- Marketing and communications preferences, including your preferences regarding newsletters, events, and other communications; and
- Information that helps us better understand the interests, preferences, and needs of our customers and prospective customers, including inferences, profiles, or insights derived from other information we collect or obtain.

How We Obtain Personal Data

We may obtain Personal Data from a variety of sources, including:

- Directly from you, when you contact us, request information, register for an event, create an account, submit a form, request support, or otherwise interact with us;
- Automatically through your use of our websites, applications, products, services, and customer portals;
- From our customers, partners, reseller relationships, affiliates, and service providers;
- From publicly available sources and third-party business information providers;
- From marketing, advertising, event, networking, and lead generation activities. Including information contained in business contact databases or marketing lists; and
- From referrals and introductions from customers, partners, and other business contacts; and
- In connection with acquisitions, mergers, reorganizations, and other corporate transactions.

We may combine Personal Data obtained from different sources to help us maintain accurate records, improve our services, personalize communications, and better understand the needs of our customers and users.



Why We Use Personal Data

We use Personal Data to:

- Provide, operate, maintain, and improve our products and services;
- Create and manage accounts and customer relationships;
- Verify identity and maintain account security;
- Respond to requests, inquiries, and support tickets;
- Manage customer, prospect, reseller, partner, and other business relationships;
- Process transactions and fulfill contractual obligations;
- Deliver and measure marketing, advertising, and promotional activities;
- Analyze website and service performance;
- Generate insights, recommendations, summaries, classifications, forecasts, or other outputs that help us improve our products, services, operations, customer support, and user experiences;
- Maintain the security, integrity, and functionality of our systems;
- Detect, prevent, and investigate fraud, misuse, or unauthorized activity;
- Comply with legal requirements and protect our rights; and
- Carry out other legitimate business purposes consistent with the context in which the information was collected.

CAI may use artificial intelligence (AI), machine learning, automation, and similar technologies in connection with certain products, services, support activities, operational processes, analytics, and business functions. These technologies may be used to enhance efficiency, improve user experiences, assist with customer support, generate insights, identify trends, improve product functionality, and support other legitimate business purposes. Where required by law, we implement appropriate safeguards and provide additional disclosures regarding the use of AI-enabled technologies.

We process Personal Data only where we have an appropriate legal basis for doing so. Depending on the circumstances, we may process Personal Data on the basis of your consent, as necessary to provide requested services, fulfill contractual obligations, comply with legal obligations, or pursue legitimate business interests in a manner that respects individuals' rights and freedoms.

How We Share Personal Data

We may share Personal Data with:

- Affiliated CAI companies and brands;
- Service providers that help us operate our business, products, websites, and services;



- Professional advisors, auditors, insurers, and legal counsel;
- Marketing, analytics, and advertising partners;
- Event, webinar, and registration providers;
- Payment processors and other transaction-related service providers;
- Business partners with whom we jointly offer products, services, or events; and
- Government authorities, regulators, courts, law enforcement agencies, or other third parties where required by law or necessary to protect our rights, users, employees, customers, or business.

We may also disclose Personal Data in connection with a merger, acquisition, financing, reorganization, sale of assets, bankruptcy, or other corporate transaction involving all or part of our business.

In some circumstances, we may share information that has been aggregated, de-identified, or otherwise does not reasonably identify an individual. Such information is not considered Personal Data and may be used for lawful business purposes.

Some of the activities described in this Privacy Notice may constitute a "sale," "sharing," or use of Personal Data for targeted advertising under certain data protection laws. Depending on your jurisdiction, you may have the right to opt out of these activities. Please see the **Your Privacy Rights** section below for additional information.

How We Protect Personal Data

Protecting Personal Data is important to CAI. We maintain physical, technical, and organizational measures designed to help safeguard Personal Data against unauthorized access, use, disclosure, alteration, loss, or destruction.

These measures may include access controls, encryption and other security technologies where appropriate, monitoring and security tools, employee training, policies and procedures, and other safeguards designed to protect the confidentiality, integrity, and availability of information.

Because no method of transmitting or storing information can be completely secure, we cannot guarantee absolute security. However, we continually evaluate and work to improve our security practices as part of our broader privacy, security, and information governance efforts.

We also encourage individuals to help protect their information by maintaining the confidentiality of account credentials, using strong passwords, and notifying us promptly of any suspected unauthorized activity involving their accounts or interactions with CAI.



How Long We Keep Personal Data

We keep Personal Data for as long as reasonably necessary to fulfill the purposes described in this Privacy Notice, including providing our products and services, maintaining our business relationships, complying with legal obligations, resolving disputes, enforcing agreements, protecting our rights, and meeting other legitimate business needs.

Because CAI offers a variety of products, services, and technologies, retention periods may vary depending on the nature of the information, the systems in which it is stored, the purposes for which it is used, and applicable legal, contractual, regulatory, or operational requirements.

When Personal Data is no longer needed, we take reasonable steps to delete, anonymize, de-identify, archive, or otherwise securely manage the information in accordance with our records management and retention practices. In some circumstances, Personal Data may be retained for longer periods where required or permitted by law, to satisfy legal, regulatory, tax, accounting, security, or compliance obligations, or in connection with legal claims, investigations, audits, or business continuity requirements.

Please note that copies of information may remain in backup, disaster recovery, or archival systems for a period of time after it has been deleted from active systems. These systems are maintained for security, business continuity, and operational resilience purposes and are subject to appropriate safeguards. When backup data is restored or becomes accessible again, we take reasonable steps to ensure that any applicable deletion or restriction requests continue to be respected.

Where we process Personal Data on behalf of a customer, we generally retain and manage that information in accordance with our contractual commitments and the customer's instructions.

International Transfers of Personal Data

CAI operates through affiliated companies, employees, contractors, service providers, and business partners located in multiple countries. As a result, Personal Data may be collected, accessed, stored, processed, or transferred outside the country where you are located.

For example, CAI and its affiliated companies have operations in the United States, Canada, EMEA, APAC, and other jurisdictions. We also work with service



providers and technology partners that support our global business operations and may process Personal Data in additional countries.

Because our business is global, Personal Data may be transferred across national borders, including to countries whose privacy or data protection laws differ from those of your home jurisdiction.

CAI is committed to protecting Personal Data wherever it is processed. When Personal Data is transferred internationally, we seek to implement appropriate safeguards designed to protect the information and comply with applicable legal requirements. Depending on the circumstances, these safeguards may include:

- Standard Contractual Clauses approved by the European Commission;
- The UK International Data Transfer Agreement or other UK-approved transfer mechanisms;
- Intra-group data transfer agreements;
- Contractual commitments with service providers and business partners;
- Technical, organizational, and security measures designed to protect Personal Data; and
- Other lawful transfer mechanisms recognized under applicable data protection laws.

If you are located in a jurisdiction that provides specific rights regarding international data transfers and would like additional information about the safeguards applicable to your Personal Data, please contact us. We are committed to helping individuals understand how their information is handled and protected.

Cookies and Privacy Choices

CAI and our service providers may use cookies and similar technologies to operate our websites and services, improve functionality, understand how our websites are used, personalize user experiences, and support analytics, advertising, and marketing activities.

Additional information about our use of cookies and similar technologies, including the categories of cookies we use and the choices available to you, can be found in our Cookie Policy.

You can manage your cookie preferences and exercise certain choices regarding analytics, advertising, targeted advertising, or similar activities through the cookie consent and preference management tools made available on our websites.



Where required by applicable law, we seek to recognize and respond to browser-based privacy preference signals, such as Do Not Track (DNT) or Global Privacy Control (GPC), and offer mechanisms that allow individuals to opt out of activities that may constitute the "sale" or "sharing" of Personal Data under applicable data protection laws.

Your Privacy Rights

Depending on where you live and the applicable data protection laws, you may have certain rights regarding your Personal Data. These rights may include the ability to:

- Learn more about the Personal Data we collect, use, and share;
- Request access to the Personal Data we hold about you;
- Request correction of inaccurate or incomplete Personal Data;
- Request deletion of your Personal Data, subject to certain exceptions;
- Request that we restrict or limit certain processing activities;
- Object to certain processing activities, including direct marketing;
- Request a copy of certain Personal Data in a portable format;
- Withdraw consent where we rely on consent as the legal basis for processing;
- Opt out of certain activities that may constitute the sale, sharing, or use of Personal Data for targeted advertising under applicable law;
- Ask for additional information about legitimate interests we rely upon when processing Personal Data; and
- Exercise any other rights provided under applicable data protection laws.

Not all rights are available in all jurisdictions, and in some cases we may decline a request where permitted or required by law. If that occurs, we will explain our decision where appropriate.

If we process Personal Data on behalf of one of our customers, we may direct you to that customer because they may be responsible for responding to certain privacy rights requests relating to that information.

Exercising Your Privacy Rights

We welcome questions about how we use Personal Data and encourage individuals to contact us if they would like additional information about their privacy rights.



To exercise your privacy rights or submit a privacy-related request, please contact us using the information provided in the **Contact Us** section below.

Where we rely on legitimate interests as a legal basis for processing Personal Data, you may contact us to request additional information about those interests and how we have balanced them against individuals' rights and freedoms.

Where we rely on your consent, you may withdraw that consent at any time. Withdrawing consent will not affect the lawfulness of processing that occurred before the consent was withdrawn, nor will it affect processing carried out on another valid legal basis.

How We Respond to Privacy Requests

We will make reasonable efforts to respond to privacy requests within the timeframes required by applicable law. Response times may vary depending on your location, the nature of your request, and whether we need additional information to verify your identity or authority to make the request.

To help protect your privacy and security, we may take reasonable steps to verify your identity before responding to certain requests. If you are submitting a request on behalf of another individual, we may request information demonstrating your authority to act on their behalf.

If we are unable to fulfill all or part of your request, we will generally explain the reason, unless we are prohibited from doing so by law. Where available under applicable law, we will also provide information about any options you may have to appeal our decision or seek further review.

We do not typically charge a fee for responding to privacy requests. However, where permitted by law, we may charge a reasonable fee or decline to act on requests that are repetitive, excessive, manifestly unfounded, or otherwise permitted to be denied under applicable law.

Complaints and Supervisory Authorities

We hope to resolve any privacy-related questions or concerns directly. However, if you are not satisfied with our response, you may have the right to lodge a complaint with a data protection authority, supervisory authority, attorney general, or other regulatory authority in the jurisdiction where you live, work, or believe a privacy violation has occurred.



If you are located in the European Economic Area, United Kingdom, or another jurisdiction that provides this right, you may contact your local supervisory authority at any time.

Our Commitment to Fair Treatment

We will not unlawfully discriminate against individuals for exercising privacy rights provided under applicable law. Subject to applicable legal requirements, exercising your privacy rights will not result in the denial of goods or services, different pricing, a different level or quality of service, or other adverse treatment.

Changes to This Privacy Notice

We may update this Privacy Notice from time to time to reflect changes in our business, products, services, technologies, legal obligations, or privacy practices.

When we make changes, we will update the "Last Updated" date at the top of this Privacy Notice and, where appropriate, provide additional notice as required by law.

We encourage you to review this Privacy Notice periodically to remain informed about how we collect, use, and protect Personal Data.

Contact Us

If you have any questions about this Privacy Notice, our privacy practices, or would like to submit a request, please contact our Privacy Team:

CAI Software, LLC
Attn: Legal Department
6510 S. Millrock Drive, Suite 225
Holladay, Utah 84121
United States

Email: privacy@caisoft.com

Phone: 800-422-4782

We welcome privacy-related inquiries and are committed to working with individuals to answer questions and address concerns regarding the handling of Personal Data.

For data protection inquiries, you may also contact our Data Protection Officer:



VeraSafe

100 M Street S.E., Suite 600
Washington, D.C. 20003 USA
Email: CAI@Verasafe.com

European Union / United Kingdom Representative

We have appointed VeraSafe as our representative in the EU/UK for data protection matters. VeraSafe can be contacted on matters related to the processing of Personal Data. To contact VeraSafe, please use this [contact form](#) or reach out via mail or telephone using the information below:

VeraSafe Ireland Ltd

Unit 3D North Point House
North Point Business Park
New Mallow Road
Cork T23AT2P
Ireland

Phone (EU): +420 228 881 031

VeraSafe United Kingdom Ltd.

37 Albert Embankment
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