



Privacy Guide for Customers

Helpful Tips on the Road to Privacy Compliance!

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Privacy Laws and Regulations

Privacy laws and regulations around the world govern the collection, processing, and disclosure of information that relates to or can be used to identify an individual, including (but not limited to) contact information, transaction information, and device information (collectively, “personal data”). The rules vary by jurisdiction and their applicability can depend on your business operations as well as the location of the individual whose personal data you’re processing. For example, if you process personal data from individuals in the EU, you may need to comply with the EU’s General Data Protection Regulation (GDPR). Or if you collect personal data of a California resident, you might need to comply with the California Consumer Privacy Act (CCPA). These are just examples; there are many privacy laws around the world.

How To Use This Guide

At Loyalty Suite, we take measures to comply with applicable privacy laws. Our customers also remain responsible for ensuring their own compliance under applicable privacy laws. This guide is meant to help our customers understand some core data privacy compliance obligations that may apply to you when using the Loyalty Suite Platform.

Please keep in mind that privacy laws are rapidly evolving, and the resulting legal landscape is both dynamic and complex. It’s possible that this guide does not remain up to date. There are also many other areas of privacy law you should keep in mind that this guide does not address, including marketing, advertising, and processing of sensitive data.

In addition, we are not your lawyers. This guide is a helpful reference, but is not intended to provide a comprehensive summary of the requirements of all privacy laws that may apply to your business, nor is it tailored to your particular circumstances.

DISCLAIMER: Loyalty Suite is not a licensed legal representative and cannot provide legal advice or interpret the law for you. Please consult your own legal advisor. This document does not constitute legal advice and should not be used as such.

Now, let’s dive in...

Data Roles

Privacy laws typically impose different obligations on an entity depending on whether the entity (a) controls the purposes for and means by which the personal data is processed, or (b) is processing personal data at the instructions of another entity.

A “**controller**” is an entity that decides, whether alone or jointly with others, why and how personal data will be processed. Controllers typically have obligations regarding the data subject’s personal data, such as providing notice of their processing practices to the data subject and giving the data subject certain rights over the processing of their data. If you are a controller of personal data, you should familiarize yourself with any applicable obligations before collecting personal data from your customers.



A “**processor**” is an entity that processes data for and on behalf of a controller. Processors must comply with instructions given by the controller with respect to the processing of the personal data under the controller’s control. There must also be a written contract meeting certain conditions, and further obligations pursuant to applicable privacy laws.

When you use the Loyalty Suite Platform, you may be a controller or processor of the personal data that you provide to us. **You are responsible for understanding your role over the personal data that you provide to us, and that your processing of that data (including when working with HighLevel) is permissible under applicable privacy laws.**

Loyalty Suite makes efforts to ensure that our platform provides our customers with the functionality they need so that their use of Loyalty Suite will not introduce new risks under applicable privacy laws. Loyalty Suite typically operates as a processor (or sub-processor) to its customers, as set forth in our Terms, Data Processing Addendum, and Privacy Policy.

You should ensure that you understand your obligations as a controller or processor, and work to bring your personal data processing systems and policies into compliance with applicable privacy laws. Below are some checklists that may be useful for your data protection compliance journey!

Controller Checklist

If you are a controller with respect to personal data, you may refer to the following checklist, which identifies some recommended compliance steps.

Privacy law requirement	Explanation	What you need to do in your Loyalty Suite Platform account	What you need to do outside of your Loyalty Suite Platform account
<p>Transparency; the Right to be informed</p>	<p>Your personal data processing practices need to be transparent. This means you need to communicate certain information to the people whose data you process.</p> <p>This includes making a public privacy notice that outlines these practices. It should specify, among other things:</p> <ul style="list-style-type: none"> (1) who you are; (2) how you collect, process, and disclose personal data; 	<p>Ensure that your organization is aware of how and why it processes all personal data.</p> <p>Create a privacy notice that explains your personal data processing practices and link to it on all webforms, landing pages, order forms, shopping carts, etc. (wherever you collect personal data). See here for how to link to your privacy notice.</p>	<p>If you choose to collect personal data through offline methods (i.e., in person), make sure your privacy notice is accessible during that interaction.</p>

Privacy law requirement	Explanation	What you need to do in your Loyalty Suite Platform account	What you need to do outside of your Loyalty Suite Platform account
Transparency; the Right to be informed	(3) how long you retain personal data; and (4) data subjects' rights with respect to their personal data that you process.		
Lawfulness of processing	Some jurisdictions require you to have a legally recognized reason to engage in the processing of personal data. This is called a "legal basis." Typical legal bases can be (1) informed consent; (2) performing contractual obligations; and (3) the legitimate interests of yourself or another entity.	Create tags to track the lawful bases of processing, and create consent checkboxes to collect express consent from data subjects. See here for how to collect consent or track legal basis. Create a regular process for deleting the personal data of data subjects whose personal data you no longer have a lawful basis to process. See the following resources for deletion of personal data for agencies , subaccounts , and prospects .	Determine, or consult legal counsel to determine, whether you have a proper legal basis for your data processing activities. If you are ever audited, you may need to provide records that indicate the lawful basis under which you collected and processed personal data. If you collect customer consent offline, be sure to keep detailed records of that consent, as Loyalty Suite will not have those records.
Consent	When relying on the data subject's consent to process their personal data: (1) the data subject needs to know what they're consenting to; (2) consent should be freely given and not forced; (3) consent should be stand-alone and not bundled with other agreements; (4) where consent is solicited by means of a checkbox, the checkbox should not be pre-ticked;	Update all your webforms and landing pages with unticked consent checkboxes and include links to your privacy policy on those pages. Include clear language about the scope of consent and how to later withdraw consent, and do not bundle the consent with other agreements. See here for help.	Implement the same recommendations anywhere else you ask for consent to process personal data. Consider creating documentation (with a time stamp) any time you make changes to your consent checkboxes or privacy notice, so that you can show the language presented to data subjects. This information is not captured in your Loyalty Suite account automatically.



Privacy law requirement	Explanation	What you need to do in your Loyalty Suite Platform account	What you need to do outside of your Loyalty Suite Platform account
Consent	<p>(5) the data subject must be able to withdraw consent at any time; and</p> <p>(6) you need to keep records to show you received consent.</p>		
Enter into data processing agreements with data processors	<p>If you engage a vendor to process personal data on your behalf, you are responsible for ensuring that they process the personal data consistent with applicable privacy laws.</p> <p>You need to enter into agreements with such vendors specifying the terms of the processing.</p>	<p>To the extent Loyalty Suite operates as your data processor, you can find our Data Processing Agreement here: https://www.loyaltysuite.app/data-processing-agreement</p>	<p>Review your relationships with existing data processing vendors to ensure that your contracts and their data processing practices are compliant with applicable privacy laws.</p>
Right to deletion of personal data; right to correct inaccuracies in personal data	<p>Data subjects may have the right to request that you erase or delete the personal data you have about them.</p> <p>They may also have the right to request that you correct inaccuracies in their personal data.</p>	<p>Create a simple way for your customers to request for their personal data to be erased or corrected. For example, you can provide customers with a form to request deletion or correction.</p> <p>Make sure you have an internal process to monitor, respond to, and process requests. You should also have a process to verify the identify of the person making the request.</p> <p>See the following help documents for how to delete data or accounts for agencies, subaccounts, and prospects.</p>	<p>If you keep customer personal data outside of the Loyalty Suite Platform, you are also responsible for erasing or correcting it upon receipt of a verified request.</p>



Privacy law requirement	Explanation	What you need to do in your Loyalty Suite Platform account	What you need to do outside of your Loyalty Suite Platform account
<p>Right to data access and portability</p>	<p>Data subjects may have the right to know whether, and which of, their personal data is being processed by your organization.</p> <p>Data subjects may also have the right to request access to their personal data in a portable manner.</p>	<p>Create a simple way for your customers to request access to the data you are processing for them.</p> <p>Make sure you have an internal process to monitor, respond to, and process requests. You should also have a process to verify the identify of the person making the request. Within the Loyalty Suite Platform, there are a few ways you can provide access to a data subject's personal data:</p> <ul style="list-style-type: none"> (1) You can take a screenshot of the data subject's customer record and send to them; or (2) You can export a contact's details in a CSV file and send to them. See the following resources for how to export contacts or client lists as CSV files. 	<p>If you keep customer personal data outside of the Loyalty Suite Platform, you are also responsible for providing access to that data upon receipt of a verified request.</p>

Processor Checklist

If you are a processor with respect to personal data, you may refer to the following checklist, which identified some recommended compliance steps.

Privacy law requirement	Explanation	What you need to do
<p>Notify and assist data controllers in the event of data subject rights requests</p>	<p>In the event that you receive a data subject's request to exercise one of their rights as provided by applicable privacy laws, you must notify the respective controller of the request. You may also need to assist the controller with actioning the request.</p>	<p>Implement a procedure for responding to data subject rights requests.</p>

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<p>Notify and assist data controllers in the event of personal data breaches</p>	<p>In the event that there is unauthorized access to, or disclosure of, a data subject’s personal data, you must notify the respective controller of the breach as soon as possible (with deadlines varying across jurisdictions), and assist them in meeting any reporting or disclosure requirements under applicable privacy laws.</p>	<p>Implement a procedure for responding to breaches of personal data.</p>
<p>Engaging sub-processors</p>	<p>You should only engage sub-processors to process personal data on your behalf if they have implemented appropriate measures to ensure the privacy and security of that personal data.</p> <p>You should notify the controller if you are considering engaging a new sub-processor, and provide them with a window of time during which they can object to your use of the sub-processor.</p>	<p>Review your relationships and contracts with existing sub-processors to ensure</p>

Our Approach to Data Privacy

Loyalty Suite adheres to global privacy standards and is certified under the EU-US Privacy Framework, including UK and Swiss extensions. We respect individuals’ privacy rights and handle personal information responsibly. All data is protected through comprehensive security measures, as outlined in Appendix I to our Data Processing Agreement, including encryption, access controls, and role-based authorizations. We collect only necessary information, maintain appropriate retention practices, and have established protocols for addressing potential security incidents. We carefully select and monitor our service providers and processors to ensure they maintain similar privacy standards. Our team members receive regular privacy and security training to safeguard customer data. For questions about our privacy practices, contact our Legal team at support@loyaltysuite.app.



More Resources

We hope this guide serves as a useful resource. Below, you will find links to other Loyalty Suite resources. As a reminder, this document does not constitute legal advice, and you should consult with your own legal counsel to determine your data privacy obligations.

Loyalty Suite Resources:

[Privacy Policy](#)

[Data Processing Agreement](#)

[Privacy and Security at Loyalty Suite](#)

[Australian Privacy Act](#)