



S M A S H F L Y

SmashFly Console

**Data Collection and Retention
for SmashFly Console Users
and Contacts**

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Table of Contents

SmashFly Console and Data Retention	3
SmashFly Console User Information.....	3
Contact Information.....	4
Default Information Collected from Talent Forms	4
Information That Can Be Collected on SmashFly Contacts	5
Standard Fields	5
Custom Fields	6
Contact Sections:	6
Status.....	6
Lists	6
Feedback	6
Tasks and Notes.....	7
Workflows.....	7
Emails or Text Messages.....	7
Sponsors.....	7
Sponsor-Specific Information, Including Their Referrals	8
Expunging Contact Records from the SmashFly Console	8

SmashFly Console and Data Retention

Within the SmashFly Recruitment Marketing Platform (RMP), a user logs into the core SmashFly module (the SmashFly Console) to leverage most aspects of the SmashFly RMP. Data is stored for both SmashFly Console users (who use the Console to manage their recruitment marketing efforts for contacts, jobs, events, and related tasks) and customer contacts (that is, the individuals whose data is collected and stored in the SmashFly Console CRM).

While the SmashFly Console does not automatically enforce data retention rules, customers can ensure data removal of contacts, based on their needs and retention rules, by leveraging the Expunge feature, described on page 8.

SmashFly Console User Information

SmashFly stores user information in a SmashFly Console database. Once a SmashFly user is created, that user is stored in the SmashFly RMP throughout the term of the relationship with SmashFly. Users can be deactivated and reactivated at any time. If necessary, specific user records may be abolished upon customer request submitted to SmashFly Technical Services. (Records that have been abolished cannot be restored.)

The following data is collected for users of the SmashFly Console:

- Last Name (mandatory)
- First Name (mandatory)
- Email (mandatory)
- Phone
- Mobile Phone
- Username (mandatory if authenticating via login)
- Password (mandatory if authenticating via login)
- SSO ID (mandatory if authenticating via SSO)
- Sourcing Groups to which the user belongs (mandatory)
- SmashFly licenses granted to the user (for example, CRM or Analytics)
- Privilege (user) groups to which the user belongs (mandatory)
- Teams to which the user belongs
- Databases to which the user has access (mandatory). Databases are customer-owned repositories of contacts.
- Default contact database in which the user will work
- Record of activities the user has taken for SmashFly Contacts (in the Activity History), including attachments added, email and SMS campaigns run, feedback requests sent, job alerts sent, notes added, global and list status changes, and workflows run. These records do not include specific field changes and do not allow replaying of actions.

Contact Information

The personal information that SmashFly collects about Contacts varies by customer implementation. The only mandatory fields to create a Contact record in the SmashFly Console are First and Last Names.

Contact information is gathered through a variety of mechanisms, including Talent Forms, web sourcing, manual addition, spreadsheet import, text messaging, integration, and Email Inhaler. When contacts are added to SmashFly via Talent Forms, additional tracking information is also stored as it relates to the ad sources and campaigns with which the Contact has engaged.

The information described in the following sections is stored in the SmashFly database for the term of the relationship with SmashFly. The personally identifying information, however, can be removed through the Expunge process, as described in “Expunging Contact Records” in the SmashFly Console on page 8.

Default Information Collected from Talent Forms

By default, SmashFly collects the information described in this section for any contacts who interact with an ad and then become a Contact through a Talent Form.

The personal information about a contact that is captured on a Talent Form is variable and is defined by the customer. At minimum, it must include the Contact’s First and Last Name. All other fields configured for inclusion in a Talent Form may be designated as mandatory or optional by the customer when configuring the Talent Form.

Customers can also define rules to configure whether contacts will complete a Talent Form while applying to a job in the Applicant Tracking System (ATS); for example, a client may configure the Talent Form to capture only jobs outside of Germany, while for jobs within Germany, all job ads send the candidate directly to the ATS to apply without ever completing the Talent Form. In addition, customers can configure whether Talent Forms — when presented to contacts in the context of a job advertisement — are required or optional for the contact to complete before continuing the process to apply to a job. Customers can also configure what data is captured per Talent Form and can use business rules to vary which Talent Form is used for different segments of jobs. For example, the data collected on U.S. contacts may be different from the data collected from Belgian contacts.

Data collection agreements or fields can be configured with customer-defined text that is mandatory for review and consent prior to completing the Talent Form. This data is stored with the Talent Form submission. Each Talent Form submitted by a Contact is date and time stamped and is fully visible to users inside the SmashFly Console, inclusive of the agreement text, questions, and fielded responses provided.

In addition to any standard or custom contact field (for a listing of these see the contact standard and custom fields below), the following metadata is always collected in SmashFly through Talent Forms:

- IP address of device
- Ads clicked, including job ads
- Sources associated with the ads that were clicked
- Date and time of the clicks

- Date and time of a contact's conversion to an applicant and the ad associated with that conversion

The metadata collected from Talent Forms is retained in SmashFly, even if the Contact's personal information record is abolished during an Expunge Process, as described in "Expunging Contact Records in the SmashFly Console" on page 8.

Talent forms can also include "agreements" that are configured into the Talent Form. When an agreement is configured into a Talent Form, the contact completing the form must agree prior to proceeding to save the form into the SmashFly RMP. Both the agreement text body and the link text to which the user is consenting are configurable and are stored as text on the contact's completed Talent Form.

Information That Can Be Collected on SmashFly Contacts

SmashFly may gather the following information in a contact record during contact record creation or over time as additional information is gathered about a contact:

Standard Fields

- First Name (always mandatory)
- Last Name (always mandatory)
- Email address
- Address 1
- Address 2
- City
- State/Region
- Country
- Zip/Postal
- Company (Employer)
- Job Title
- School (Educational Institution)
- Job Code
- Experience Level
- Education Level
- Current Source
- Method by which the contact entered the system (for example, Talent Form, Talent Form Job Apply, Email Inhaler, API, and so on)
- Home phone
- Work phone
- Mobile phone, if authorized to receive text messages
- Primary Email, if authorized to receive email

- Alternate Email
- Whether the contact is an internal employee or external contact
- Whether the contact can be a feedback recipient (Yes/No)
- Social Profile URL: Web
- Social Profile URL: Twitter
- Social Profile URL: Facebook
- Social Profile URL: LinkedIn
- Whether the Contact is a Referral (Yes/No)
- Whether the Contact is a Sponsor (Yes/No)
- Whether the contact has been tracked into the ATS (Yes/No)

Custom Fields

- Up to an additional 115 client defined custom fields

Contact Sections:

- Completed Talent Forms – the date completed, the fields and responses provided, and agreement link and text, if they are part of the Talent Form's configuration
- Contact Other Forms – the date completed, the user who completed the form, the fields, and the responses provided
- Attachments, including resume attachment and links (URLs to contact-specific materials, such as personal web sites)
- Results of integrated services, such as HireVue Interview – status of request, link to results, and date of request and results
- Education History – School, Major, Degree, and Grad Year (multiple instances stored)
- Work History – Start and End Months, Position Title, Supervisor Name and Title, Employer name, and State/Prov.
- Resume Section – the text of the current (most recently provided) resume of the contact

Status

- Status Overarching (Global) of the Contact

Lists

- Pipelines / Lists that the Contact is associated with (including general, job, or event lists)
- Status of the Contact in the context of that list

Feedback

- Any Feedback Requests (records of Contacts that are sent to someone to review via email without requiring login to the SmashFly Console) that were sent about the contact, as well as the input provided by Feedback Recipients (the people who receive the feedback requests) for

Feedback that we store. A Feedback Request is only “active” for viewing while the Feedback Recipient is a valid recipient, which means that the Feedback Recipient must be either a SmashFly Console User or a designated Contact who has the Feedback Recipient designation. As soon as the Feedback Recipient designation is revoked, or the Contact or Console User is deactivated, the Feedback Request is disabled. For Feedback Requests, the following information is stored in the SmashFly Console:

- The Contact record as it was presented to the Feedback Recipient; only the parts of the Contact record that were sent to the Feedback Recipient in the Feedback Request are stored.
- SmashFly Console User who generated the Feedback Request
- Whether the Feedback Recipient viewed the Contact
- Whether the Feedback Recipient responded to the Request and the date of their response
- Date and time when the Feedback Request was generated
- Feedback provided by the Feedback Recipient

Tasks and Notes

- Any tasks created, as well as the notes, dates, status associated with those tasks, the user who created the task, and who the task is assigned to
- Any notes added to the Contact record, as well as the date created and who created the note

Workflows

- Any workflows run on the Contact’s record; SmashFly retains only the name of the workflow and when it ran for the Contact. A workflow is an action or process that is created in the SmashFly Console Workflow Designer that can be used to automate updates of data on contact records in the SmashFly RMP or to trigger timed actions (such as sending emails or SMS messages, assigning tasks, updating status, or requesting feedback) to Contacts, SmashFly Console Users, recruiters, managers, job team members (SmashFly users who are assigned to a job), or sponsors. Each time a workflow action is taken for a Contact record, the action is recorded in the Activity Stream for the Contact.

Emails or Text Messages

- Any emails or text messages that were sent to the Contact and whether they were clicked; these are essentially treated as ads.

Sponsors

- For any Contact who has been referred, SmashFly tracks the following for each Sponsor Submission:
 - Date and Time of the Referral
 - Sponsor (also a Contact in the SmashFly Console) who referred the individual
 - Talent Form and all data provided by the Sponsor on the Talent Form while referring the contact

- Status of the referral submission by the Sponsor (whether the contact has viewed or confirmed the Sponsor)
- Whether the Sponsor is Eligible for a Referral Bonus for that specific Referral

Sponsor-Specific Information, Including Their Referrals

- For any SmashFly Console Contact who is a Sponsor, SmashFly tracks specific Sponsor information, as well as their links to the Contacts they have referred. For the Referrals that the Sponsor has submitted, SmashFly tracks the following:
 - Date and Time of the Referral
 - Contact (also a Contact in the SmashFly Console) that the Sponsor has referred
 - Talent Form and all data the Sponsor provided on the Talent Form while referring the Contact
 - Status of the referral submission by the Sponsor (whether the Contact has viewed or confirmed the Sponsor)
 - Whether the Sponsor is Eligible for Referral Bonus for that specific Referral
- In addition to tracking the Sponsor's referrals and other relevant Contact data that may be gathered about the Sponsor, SmashFly stores the following additional information about SmashFly Console Contacts who are Sponsors:
 - The type of Sponsor (Employee, Partner, Alumni, and so on); Sponsor Types are defined by the customer
 - SSO ID (if the Sponsor is authenticating via SSO)
 - Username (if the Sponsor is authenticating via direct login)
 - Password (if the Sponsor is authenticating via direct login)

Expunging Contact Records from the SmashFly Console

If necessary, customers can use the Expunge feature to eliminate Contacts and their data from the SmashFly Console. In the Workflow Designer, SmashFly Console users can configure business rules to identify Contacts who should be expunged and can run workflows that mark those Contacts to be expunged. When the Expunge process runs, all personal information for any Contacts who were marked to be expunged is removed from the SmashFly Console, and the Contacts are not visible for users who are navigating the SmashFly Console.

Any non-personal information (the metadata) for the expunged contacts will display in reports when Inactive Contacts are selected to be included in the report output. If the expunged contacts are later added to the SmashFly Console again, there is no way to match them with the prior records because the record that does remain in the SmashFly RMP contains no personal information.

Note: Expunging records is different from having a contact opt out of receiving communications from SmashFly. Contacts who choose to opt out are marked not to receive emails or text messages from SmashFly — based on which they have opted out of — but their contact records and any personal information that has been collected is retained.

The Expunge process replaces the Contact first and last names with the text "XXX" and deletes all personal contact data, Standard and Custom Fields, Tags, Education, Experience, Talent Forms,

Contact Forms, Attachments, Resume text, manually entered Notes, Feedback Requests, Tasks, and any history of manually sent correspondence. It does not delete metadata such as Job Apply clicks, source and method history, history of when the contact was added and updated, system notes, referrals made by the contact, or campaigns sent to the contact.

Following is the full list of information that is permanently deleted through the Expunge process:

- All Basic Contact Information:
 - First Name (replaced with "XXX")
 - Last Name (replaced with "XXX")
 - Address 1
 - Address 2
 - City
 - State
 - Zip/Postal
 - Country
 - Home Phone
 - Work Phone
 - Mobile Phone
 - Primary Email
 - Other Email
 - LinkedIn Profile
 - Twitter Profile
 - Facebook Profile
 - Web URL
 - Job Title
 - Company
 - School
 - Job Code
 - Experience
 - Education
 - Referral Amount and Payout Date
- Tags
- IP Address (not currently expunged, but it will be prior to May 25, 2018)
- Experience Section
- Education Section
- Talent Forms

- Documents
- Resumes
- Services (for example, HireView Interviews)
- Contact Forms
- Custom Fields
- Notes added by user; System notes are retained.
- Tasks
- Feedback Requests
- Sponsor and Referral Data
- Manual Correspondence sent to contact that blind copied the system in the message that was sent

Note: SmashFly is in the process of adding contact IP address to the list of items to be expunged when the Expunge process executes. This enhancement is planned for completion during the 2018 calendar year.