



# Dear Lucy

## Technical overview

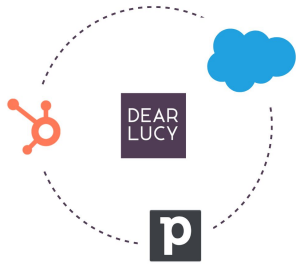
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[dearlucy.co](http://dearlucy.co)

DEAR  
LUCY

CONFIDENTIAL

# Overview of the Dear Lucy platform



## Common way to fetch data from source systems

Regardless of the source system, the data is fetched in a similar manner. This enables Dear Lucy to seamlessly combine data across systems.

The integrations fetch data from CRM's such as sales opportunities, pipelines, activities, companies, opportunity owners etc.

Schema and data

Users and permissions

Dashboards

Targets

## Data governance & normalization

Each customer environment is separated from each other to prevent accidental data access.

Database schemas are designed to conform with sales related data with flexibility to bring custom data into the platform.

The data model is designed to be fast for data retrieval and also handle large amounts of sales data.



## From data to visualization

Data is accessed via Dear Lucy's user interface.

Access to environments requires an authentication and only authorized users can access dashboard or create new dashboards.

Dashboards can be also be shared via cryptographically secured links.

Security of your data is our primary concern.

We are continuously working on protecting your data with enterprise level security while delivering your key business metrics in one place.

We apply GDPR rules for all our customers.

# Data transfer and storage

- All traffic between our users and the service is encrypted using HTTPS and WSS (TLS/SSL). For integrations, HTTPS is the default. Only in special cases, and by explicit request by the customer, do we allow integrations to APIs that don't support encryption.
- All Dear Lucy services are hosted within the EU. We currently use AWS, Heroku and MongoDB Atlas for service infrastructure and data storage. Physically application servers, data and backups reside in AWS eu-west-1 data centers in Ireland.
- Customer data is fully backed up several times per day. We store daily, weekly and monthly backups up to 13 months. After that, backups are fully removed.
- Personal data can be removed from the system by the Customer. Removed data will stay on disaster recovery systems for a while and will be removed automatically according to the backup rotation cycles. All data removals are secure and no data can be restored after it has been removed from backups.

# Integrations

- Integrations use credentials that are supplied by the customer during the integration phase.
- Integrations use open authorization framework (OAuth) to authenticate the access to the source system. This is an industry standard way to allow secure, third-party and delegated authorization.
- For integrations that do not support OAuth, Dear Lucy uses alternative authentication methods such as username and password authentication.
- All credentials are securely stored using cryptographic algorithm in the Dear Lucy database.

# User management and access control

- Users can access Dear Lucy dashboards with password authentication, using Google or Azure Active Directory Single Sign-on, or via shared Kiosk links. If SSO federation is not in use, adding new users is limited to the users with admin rights.
- There are two user levels:
  - **Admin** Can invite new users to the platform, create new integrations, create new dashboards, modify existing dashboard and define targets.
  - **User** Can view dashboards that (s)he has been given a permission to access.
- Dear Lucy dashboards support “group-based” permissions. Groups define which dashboards the group members can access. With password or SSO authentication, the user can be assigned to one or more groups that clearly define what dashboards they can view.
- In addition, the access to your company’s dashboards can be further restricted with IP filtering. To enable IP filtering, please contact Dear Lucy customer support.

# Shareable links

- A typical use-cases for shareable links are info-screens at the office that are constantly on.
- Each shareable link can be limited to a subset of dashboards.
- Link URLs are public but created with a cryptographically secure hash making them practically impossible to guess.
- We also protect against brute force attacks blocking scripted attempts to guess the link hash.
- Shareable links look something like this:

<https://login.dearlucy.co/kiosk?token=63ca2995e24c128b4d62a766d180c2e80d253b528bafb5ef79f91a8565d4ca4e>

# Dear Lucy product demo





# For more information

For more information on our technical security measures, please visit our Support site:

<https://support.dearlucy.co/hc/en-us/articles/360008988699-Technical-Security-Measures>

For an overview of our GDPR practices, please visit our Support site:

<https://support.dearlucy.co/hc/en-us/articles/360008989039-Dear-Lucy-GDPR-Compliance>

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