

# Terms of Service

Last updated: June 18, 2026

These Terms of Service ("Terms") govern access to and use of the CadreIQ services, websites, applications, APIs, integrations, and related offerings (collectively, the "Services") provided by CadreIQ Inc. ("CadreIQ," "we," "us," or "our").

These Terms should be reviewed with legal counsel before publication.

## 1. Acceptance of Terms

By accessing or using the Services, you agree to these Terms. If you are using the Services on behalf of a company or other organization, you represent that you have authority to bind that organization to these Terms. In that case, "Customer," "you," and "your" refer to that organization and its authorized users.

If you do not agree to these Terms, you may not access or use the Services.

## 2. The Services

CadreIQ provides a cloud-based software platform that helps business and revenue teams analyze customer relationship management, sales, performance, workflow, team, coaching, and related operational data.

The Services may include:

- Web-based application functionality.
- Backend application services and APIs.
- AI-assisted analysis, recommendations, summaries, scores, workflows, or related outputs.
- Graph-based analysis and intelligence features.
- Customer-authorized integrations with third-party systems.
- Administrative, reporting, configuration, and analytics features.

The Services are intended for business use only and are not intended for personal, household, consumer, medical, financial-advisory, legal-advisory, or regulated healthcare use.

## 3. Accounts and Authorized Users

Customers are responsible for:

- Ensuring that only authorized users access the Services.
- Maintaining accurate account and user information.
- Protecting account credentials.
- Ensuring authorized users comply with these Terms.

- Promptly notifying CadreIQ of suspected unauthorized access, credential compromise, or misuse.

Users must not share accounts, passwords, authentication tokens, MFA factors, API keys, or other credentials.

CadreIQ may suspend or restrict access if we reasonably believe an account is compromised, used in violation of these Terms, or creates security, legal, operational, or business risk.

#### **4. Customer Data**

"Customer Data" means data, content, records, files, prompts, configuration, integration data, user information, CRM data, calendar or communication metadata, and other information submitted to, connected to, generated through, or processed by the Services on behalf of Customer.

Customer retains ownership of Customer Data. Customer grants CadreIQ a limited right to process Customer Data as necessary to:

- Provide, operate, secure, maintain, and improve the Services.
- Support customer-authorized integrations.
- Generate platform outputs and analytics.
- Troubleshoot, monitor, and support the Services.
- Comply with applicable law, contracts, and these Terms.
- Prevent misuse, fraud, security incidents, or unauthorized access.

Customer is responsible for ensuring it has the rights, permissions, consents, notices, and lawful basis needed to provide Customer Data to CadreIQ and to authorize CadreIQ to process it under these Terms.

#### **5. Integrations and Third-Party Services**

The Services may integrate with third-party systems, including CRM, calendar, communication, AI, search, productivity, and other customer-authorized services.

Customer is responsible for:

- Authorizing integrations.
- Managing permissions in connected systems.
- Ensuring the integration use complies with applicable third-party terms.
- Ensuring Customer has rights to provide integrated data to CadreIQ.

CadreIQ is not responsible for third-party services that it does not control. Third-party services may be governed by their own terms, privacy policies, security practices, availability commitments, and data processing terms.

## 6. AI Features and Outputs

The Services may include AI-assisted features that generate summaries, recommendations, classifications, scores, insights, workflows, or other outputs ("Outputs") based on Customer Data, user prompts, retrieved context, configuration, and related information.

Customer acknowledges that AI-generated Outputs may be incomplete, inaccurate, or unsuitable for a particular use without human review. Customer is responsible for reviewing Outputs before relying on them for business decisions.

Customer must not use the Services to submit:

- Plaintext passwords.
- API keys, tokens, private keys, or credentials.
- Highly sensitive personal information that is not necessary for the intended business purpose.
- Data Customer is not authorized to process or provide.
- Content that violates law, third-party rights, or these Terms.

CadreIQ does not provide legal, financial, employment, medical, or regulated professional advice through the Services.

## 7. Acceptable Use

Customer and users must not:

- Use the Services in violation of law, regulation, contract, or third-party rights.
- Attempt to gain unauthorized access to the Services or related systems.
- Circumvent, disable, or interfere with security controls.
- Probe, scan, or test the vulnerability of the Services without written authorization.
- Introduce malware, malicious code, or harmful content.
- Use the Services to harass, abuse, defame, threaten, or harm others.
- Upload or process data that Customer is not authorized to use.
- Reverse engineer, decompile, disassemble, or attempt to derive source code except as permitted by law.
- Scrape, harvest, or extract data except through functionality made available by CadreIQ.
- Use the Services to build or benchmark a competing product without written permission.
- Overload, disrupt, degrade, or interfere with the Services.
- Remove proprietary notices.
- Share credentials or permit unauthorized users to access the Services.

CadreIQ may investigate suspected violations and may suspend or restrict access when reasonably necessary to protect the Services, customers, data, or CadreIQ.

## **8. Security**

CadreIQ maintains administrative, technical, and organizational safeguards designed to protect the Services and Customer Data.

Customer is responsible for:

- Managing authorized user access.
- Using strong authentication controls where available.
- Protecting credentials.
- Promptly removing access for users who no longer need it.
- Notifying CadreIQ of suspected unauthorized access or compromise.
- Using the Services in a secure and lawful manner.

CadreIQ's security practices may include access controls, logging, monitoring, vendor risk review, vulnerability management, backup and recovery processes, encryption in transit and at rest where supported, and incident response procedures.

No service can be guaranteed to be completely secure.

## **9. Confidentiality**

Each party may receive non-public information from the other party that is marked or reasonably understood to be confidential ("Confidential Information").

Confidential Information may include business plans, technical information, security information, product plans, source code, pricing, customer information, Customer Data, and other non-public information.

Each party will:

- Use Confidential Information only for purposes related to these Terms or the Services.
- Protect Confidential Information using reasonable care.
- Not disclose Confidential Information except to personnel, contractors, advisors, service providers, or representatives who need to know it and are subject to confidentiality obligations.

Confidentiality obligations do not apply to information that is publicly available without breach, already known without restriction, independently developed without use of Confidential Information, or lawfully received from a third party without confidentiality restriction.

## **10. Privacy**

CadreIQ's processing of personal information is described in our Privacy Policy, available on our website.

Customer is responsible for providing required privacy notices and obtaining required consents from its users, employees, contractors, customers, prospects, or other individuals whose data Customer provides to the Services.

## **11. Data Retention and Deletion**

CadreIQ retains Customer Data and related records as described in the Privacy Policy, applicable customer agreements, and CadreIQ's retention practices.

Upon termination or expiration of the Services, Customer may request return, export, or deletion of Customer Data where supported and legally/technically feasible.

Customer acknowledges that backups, logs, audit records, security evidence, and residual copies may retain Customer Data for a period of time after deletion from primary systems until normal retention or lifecycle periods expire, unless otherwise required by applicable law or written agreement.

CadreIQ may retain information as needed to comply with law, enforce agreements, resolve disputes, prevent fraud or abuse, maintain security, or satisfy legal, audit, tax, or compliance obligations.

## **12. Fees, Payment, and Subscriptions**

Fees, subscription terms, billing terms, renewal terms, and payment obligations will be described in the applicable order form, subscription agreement, statement of work, invoice, or other written agreement between Customer and CadreIQ.

Unless otherwise stated in an applicable written agreement:

- Fees are due in U.S. dollars.
- Customer is responsible for applicable taxes, excluding taxes based on CadreIQ's net income.
- Payment obligations are non-cancelable and fees paid are non-refundable except as expressly stated in writing.

If payment is overdue, CadreIQ may suspend access after reasonable notice, unless the amount is subject to a good-faith dispute.

## **13. Intellectual Property**

CadreIQ and its licensors own all rights, title, and interest in the Services, software, platform, technology, documentation, models, workflows, designs, know-how, trademarks, and other CadreIQ materials.

Subject to these Terms and payment of applicable fees, CadreIQ grants Customer a limited, non-exclusive, non-transferable right to access and use the Services for Customer's internal business purposes during the applicable subscription term.

Customer may provide feedback, suggestions, or recommendations about the Services. CadreIQ may use feedback without restriction or obligation, provided CadreIQ does not disclose Customer Confidential Information in doing so.

No rights are granted except as expressly stated in these Terms.

## **14. Service Changes and Availability**

CadreIQ may update, modify, improve, or discontinue features from time to time.

CadreIQ will use commercially reasonable efforts to avoid materially reducing core functionality during an active subscription term, but the Services may be unavailable from time to time due to maintenance, updates, outages, security events, vendor issues, or causes beyond CadreIQ's reasonable control.

CadreIQ does not guarantee uninterrupted or error-free service unless a separate written agreement expressly provides a service level commitment.

## **15. Suspension**

CadreIQ may suspend or restrict access to the Services if:

- Customer or a user violates these Terms.
- Use of the Services creates security, legal, operational, or third-party risk.
- Credentials appear compromised.
- Customer fails to pay undisputed overdue fees after notice.
- Suspension is required by law or third-party service provider requirement.

CadreIQ will use reasonable efforts to provide notice when practical, unless immediate suspension is needed to prevent harm.

## **16. Term and Termination**

These Terms remain in effect while Customer or users access or use the Services.

Either party may terminate as provided in an applicable order form, subscription agreement, statement of work, or written agreement.

CadreIQ may terminate or suspend access for material breach if the breach is not cured within a reasonable period after notice, or immediately for serious security, legal, or misuse concerns.

Upon termination:

- Customer's right to use the Services ends.
- Customer must stop using the Services.

- Each party must return or delete Confidential Information as required by applicable agreement, subject to legal and retention obligations.
- Provisions intended to survive termination will survive, including confidentiality, intellectual property, payment obligations, disclaimers, limitation of liability, indemnification, and dispute provisions.

## **17. Disclaimers**

THE SERVICES ARE PROVIDED "AS IS" AND "AS AVAILABLE" EXCEPT AS EXPRESSLY STATED IN A WRITTEN AGREEMENT.

TO THE MAXIMUM EXTENT PERMITTED BY LAW, CADREIQ DISCLAIMS ALL WARRANTIES, EXPRESS, IMPLIED, STATUTORY, OR OTHERWISE, INCLUDING IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE, NON-INFRINGEMENT, AND ERROR-FREE OR UNINTERRUPTED OPERATION.

CADREIQ DOES NOT WARRANT THAT OUTPUTS, RECOMMENDATIONS, ANALYSES, SCORES, OR OTHER RESULTS WILL BE ACCURATE, COMPLETE, OR APPROPRIATE FOR CUSTOMER'S PARTICULAR USE WITHOUT REVIEW.

## **18. Limitation of Liability**

TO THE MAXIMUM EXTENT PERMITTED BY LAW, NEITHER PARTY WILL BE LIABLE FOR INDIRECT, INCIDENTAL, SPECIAL, CONSEQUENTIAL, EXEMPLARY, OR PUNITIVE DAMAGES, OR FOR LOST PROFITS, LOST REVENUE, LOST BUSINESS, LOSS OF GOODWILL, OR LOSS OF DATA, EVEN IF ADVISED OF THE POSSIBILITY OF SUCH DAMAGES.

EXCEPT FOR EXCLUDED CLAIMS OR AMOUNTS OWED, EACH PARTY'S TOTAL LIABILITY ARISING OUT OF OR RELATING TO THESE TERMS OR THE SERVICES WILL NOT EXCEED THE AMOUNTS PAID OR PAYABLE BY CUSTOMER TO CADREIQ FOR THE SERVICES IN THE TWELVE MONTHS BEFORE THE EVENT GIVING RISE TO LIABILITY.

The parties should define any excluded claims, if any, in the applicable written agreement.

## **19. Indemnification**

Customer will defend, indemnify, and hold harmless CadreIQ from and against third-party claims arising from:

- Customer Data.
- Customer's use of the Services in violation of these Terms.
- Customer's violation of law or third-party rights.
- Customer-authorized integrations or connected systems.

- Customer's failure to obtain required rights, notices, permissions, or consents.

CadreIQ will provide reasonable notice of the claim and reasonable cooperation, at Customer's expense.

Any CadreIQ indemnity obligations, if applicable, should be set out in a written customer agreement or order form.

## **20. Governing Law and Disputes**

These Terms are governed by the laws of the State of Illinois, without regard to conflict-of-law principles, unless a separate written agreement states otherwise.

The parties agree to attempt in good faith to resolve disputes informally before initiating formal proceedings.

Any venue, arbitration, class action waiver, or dispute-resolution requirements should be reviewed and finalized with legal counsel before publication or use.

## **21. Compliance With Laws**

Customer must use the Services in compliance with applicable laws and regulations.

The Services are not designed for processing protected health information under HIPAA, financial account data regulated by GLBA, payment card data subject to PCI DSS, classified information, or other highly regulated data unless CadreIQ expressly agrees in writing.

Customer must not use the Services in a way that would require CadreIQ to comply with laws or regulations not expressly agreed to in writing.

## **22. Export and Sanctions**

Customer must comply with applicable export control, sanctions, and trade laws. Customer may not use the Services in embargoed jurisdictions or by prohibited parties where such use would violate applicable law.

## **23. Changes to These Terms**

CadreIQ may update these Terms from time to time. When we update them, we will revise the "Last updated" date above.

If changes are material, we may provide additional notice through the website, platform, email, or other appropriate means.

Continued use of the Services after updated Terms become effective means Customer accepts the updated Terms.

## **24. Miscellaneous**

These Terms, together with any applicable order form, subscription agreement, statement of work, privacy policy, or written agreement, constitute the agreement between Customer and CadreIQ regarding the Services.

If any provision is unenforceable, the remaining provisions remain in effect.

Neither party is liable for delay or failure caused by events beyond its reasonable control.

Customer may not assign these Terms without CadreIQ's prior written consent, except in connection with a merger, acquisition, or sale of substantially all assets. CadreIQ may assign these Terms in connection with a merger, acquisition, reorganization, or sale of assets.

No waiver is effective unless in writing.

## **25. Contact**

Questions about these Terms may be directed to:

CadreIQ Inc.  
Dallas, TX  
United States

Email: [james@cadreiq.com](mailto:james@cadreiq.com)