

Privacy Policy

Effective Date: July 1st, 2025

Last Updated: July 13th, 2025

This Privacy Policy describes how Lista CRM (“we”, “our”, or “us”) collects, uses, discloses, and protects your information when you use our real estate Customer Relationship Management (CRM) platform (“Platform”) and associated services.

By accessing or using the Platform, you agree to the collection and use of your personal information in accordance with this Privacy Policy.

1. Information We Collect

We collect the following categories of information:

- a. User Account Information
 - Full name
 - Email address
 - Phone number
 - Business affiliation (brokerage/company name)
 - Authentication credentials (via standard login or integrated SSO providers like Okta)
- b. Lead and Client Data
 - Names, contact details, and profile information of leads added by users
 - Buyer preferences, transaction history, lead status
 - Communication records related to leads
- c. Listing Data
 - Property descriptions, images, pricing, location, and MLS metadata
 - Uploaded media and documentation associated with real estate listings
- d. Usage and Technical Data
 - Browser and device type, IP address
 - Log data (login times, actions performed)
 - Calendar and scheduling events
 - Marketing campaign activity
 - CRM usage patterns (for performance and analytics)
- e. Third-Party Integrations
 - When you connect third-party services (e.g., Meta, Google, WhatsApp, LinkedIn, MLS Matrix), we may receive data as permitted by those services’ privacy policies and your integration settings.

2. How We Use Your Information

- We use your data to:
 - Provide access to and manage your CRM account
 - Enable lead management, property listing, and transaction workflows
 - Facilitate internal communication between admins and agents
 - Synchronize third-party integrations (e.g., Google Calendar, Meta Ads, MLS Matrix)
 - Run and track marketing campaigns
 - Improve platform functionality and user experience
 - Send platform notifications, reminders, and updates
 - Ensure security, detect fraud, and enforce terms of use
 - Comply with legal and regulatory obligations
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3. Legal Basis for Processing

- Depending on your jurisdiction, we process your data under one or more of the following legal bases:
 - Contractual necessity: to deliver our CRM services to you
 - Legitimate interest: for internal operations, analytics, and fraud prevention
 - Consent: for marketing activities and certain integrations
 - Legal obligation: where we are required to retain or disclose information
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4. Data Sharing and Disclosure

- We do not sell your personal data. We may share your information only as follows:
 - With your organization's admin: Admin users have access to agent activity and lead data within their brokerage
 - With authorized third-party providers: For hosting, analytics, communication, payment, and integration purposes
 - For legal reasons: When required to comply with laws, regulations, or valid legal requests
 - In business transfers: In case of merger, acquisition, or sale of assets, where your data may be part of the transferred business
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5. Data Security

- We implement industry-standard security practices to safeguard your data, including:
 - Role-based access controls

- Data encryption at rest and in transit
 - Secure login protocols (e.g., OAuth 2.0, JWT, SSO via Okta)
 - Routine system audits and monitoring
 - Regular data backups and disaster recovery procedures
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6. Data Retention

- We retain your personal and business data only for as long as necessary to:
 - Deliver our services
 - Fulfill legal or contractual obligations
 - Resolve disputes and enforce our terms
 - Upon account deactivation, we will initiate data deletion after a [30]-day grace period, unless required otherwise by law or administrative request.
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7. Your Rights

- Depending on your region, you may have the right to:
 - Access a copy of your personal data
 - Request correction of incorrect or outdated information
 - Delete your data (“right to be forgotten”)
 - Withdraw consent (where applicable)
 - Object to processing or request data portability
 - To exercise any of these rights, please contact us at: [privacy@e-systematic.com]
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8. Cookies and Tracking

- We may use cookies or similar technologies for:
 - Session management
 - Analytics
 - Personalized content
 - Platform optimization
 - You may manage your cookie preferences via your browser settings or through in-app privacy controls where available.
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9. Third-Party Links

- Our platform may contain links to third-party websites or tools. We are not responsible for their privacy practices. Please review their respective policies before using those services

10. International Data Transfers

- Our services may be hosted in jurisdictions outside of your own. When data is transferred internationally, we ensure it is protected in accordance with applicable data protection laws and with adequate safeguards.
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11. Changes to This Policy

- We may update this Privacy Policy from time to time. When we do, we will revise the “Last Updated” date and notify you of significant changes through the platform or via email.
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12. Contact Us

For questions or concerns regarding this Privacy Policy, please contact:

E-SYSTEMATIC

Email: privacy@listacrm.com

Website: <https://www.listacrm.com>