

Bookkeeper On Call Customer Privacy Notice

This privacy notice tells you what to expect us to do with your personal information. Bookkeeper On Call ("**We**", "**Us**", "**Our**", "**Organisation**", "**Business**") is the data controller of your personal data.

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- [What information we collect, use, and why](#)
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Where we process personal data for direct marketing purposes, you have the right to object at any time to processing. For more information, please see the section on [Lawful bases and data protection rights](#).

Contact details

Email

aline@bookkeeperoncall.co.uk

What information we collect, use, and why

We collect or use the following information to **provide and improve products and services for clients**:

- Names and contact details
- Addresses

- Pronoun preferences
- Occupation
- Payment details (including card or bank information for transfers and direct debits)
- Financial data (including income and expenditure)
- Transaction data (including details about payments to and from you and details of products and services you have purchased)
- Usage data (including information about how you interact with and use our website, products and services)
- Information relating to compliments or complaints
- Records of meetings and decisions
- Website user information

We collect or use the following personal information for the **operation of client or customer accounts**:

- Names and contact details
- Addresses
- Purchase or service history
- Account information, including registration details
- Information used for security purposes
- Marketing preferences
- Technical data, including information about browser and operating systems

We collect or use the following personal information **for the prevention, detection, investigation or prosecution of crimes**:

- Names and contact information
- Client accounts and records

We collect or use the following personal information for **information updates or marketing purposes**:

- Names and contact details
- Addresses
- Marketing preferences
- Purchase or account history
- Website user journey information

We collect or use the following personal information to **comply with legal requirements**:

- Contact information
- Identification documents
- Client account information
- Any other personal information required to comply with legal obligations

We collect or use the following personal information for **dealing with queries, complaints or claims**:

- Names and contact details
- Account information
- Customer or client accounts and records
- Financial transaction information
- Correspondence

Lawful bases and data protection rights

Under UK data protection law, we must have a “lawful basis” for collecting and using your personal information. There is a list of possible lawful bases in the UK GDPR. You can find out more about lawful bases on the ICO’s website.

Which lawful basis we rely on may affect your data protection rights which are in brief set out below. You can find out more about your data protection rights and the exemptions which may apply on the ICO's website:

- **Your right of access** - You have the right to ask us for copies of your personal information. You can request other information such as details about where we get personal information from and who we share personal information with. There are some exemptions which means you may not receive all the information you ask for. [You can read more about this right here.](#)
- **Your right to rectification** - You have the right to ask us to correct or delete personal information you think is inaccurate or incomplete. [You can read more about this right here.](#)
- **Your right to erasure** - You have the right to ask us to delete your personal information. [You can read more about this right here.](#)
- **Your right to restriction of processing** - You have the right to ask us to limit how we can use your personal information. [You can read more about this right here.](#)
- **Your right to object to processing** - You have the right to object to the processing of your personal data. [You can read more about this right here.](#)
- **Your right to data portability** - You have the right to ask that we transfer the personal information you gave us to another organisation, or to you. [You can read more about this right here.](#)
- **Your right to withdraw consent** - When we use consent as our lawful basis you have the right to withdraw your consent at any time. [You can read more about this right here.](#)

If you make a request, we must respond to you without undue delay and in any event within one month.

To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

Our lawful bases for the collection and use of your data

Our lawful bases for collecting or using personal information to **provide and improve products and services for clients** are:

Provide and improve products and services for clients		
Lawful Basis	Purpose	Data Categories
Consent	We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. You have the right to withdraw your consent at any time.	<ul style="list-style-type: none"> • Names and contact details • Addresses • Pronoun preferences • Occupation • Date of birth • Payment details (including card or bank information for transfers and direct debits) • Financial data (including income and expenditure) • Transaction data (including details about payments to and from you and details of products and services you have purchased) • Usage data (including information about how you interact with and use our website, products and services) • Information relating to compliments or complaints • Records of meetings and decisions • Account access information • Website user information
Contract	We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.	
Legitimate Interests	<p>We're collecting or using your information because it benefits you, our Organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:</p> <ul style="list-style-type: none"> - Personalising and tailoring our products and services for you which is necessary for our legitimate interests (to define types of customers for our goods and services, to keep our websites updated and relevant, to develop our business and to inform our marketing strategy) - Manage payments, fees and charges / Collect and recover money owed to us which is necessary for our legitimate interests (to recover debts due to us) 	

Our lawful bases for collecting or using personal information for the **operation of client or customer accounts** are:

Operation of client or customer accounts

Operation
of client
or

Lawful Basis	Purpose	Data Categories
Consent	We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. You have the right to withdraw your consent at any time.	<ul style="list-style-type: none"> • Names and contact details • Addresses • Purchase or service history • Account information, including registration details • Information used for security purposes • Marketing preferences • Technical data, including information about browser and operating systems
Contract	We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.	
Legitimate Interests	<p>We're collecting or using your information because it benefits you, our Organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:</p> <ul style="list-style-type: none"> - To manage our relationship with you which will include notifying you about changes to our terms or privacy policy or asking you to leave a review or take a survey which is necessary for our legitimate interests (to keep our records updated and to study how customers use our services). - To make suggestions and recommendations to you about goods and services that may be of interest to you which is necessary for our legitimate interests (to develop our goods and services and grow our business). - To administer and protect 	

	<p>our business and our websites (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data) which is necessary for our legitimate interests (for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise).</p> <p>- To administer and protect our business and our websites (including troubleshooting, data analysis, testing, system maintenance, support, reporting and hosting of data) which is necessary for our legitimate interests (for running our business, provision of administration and IT services, network security, to prevent fraud and in the context of a business reorganisation or group restructuring exercise)</p>	
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Our lawful bases for collecting or using personal information **for the prevention, detection, investigation or prosecution of crimes** are:

For the prevention, detection, investigation or prosecution of crimes			Operation of client or customer accounts
Lawful Basis	Purpose	Data Categories	
Legal Obligation	We have to collect or use your information so we can comply with the law. All of your data	<ul style="list-style-type: none"> Names and contact information Client accounts 	

	protection rights may apply, except the right to erasure, the right to object and the right to data portability.	and records
Legitimate Interests	<p>We're collecting or using your information because it benefits you, our Organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:</p> <ul style="list-style-type: none"> - To the extent that we are duty bound by any applicable legal or regulatory requirement to cooperate with any competent legal or governmental authority or agency (such as HMRC), we shall do so in accordance with applicable law. We have a legitimate interest in ensuring we comply with all applicable legal requirements. This may involve disclosure of your personal data. 	

Our lawful bases for collecting or using personal information for **information updates or marketing purposes** are:

for information updates or marketing purposes			Operation of client or customer accounts
Lawful Basis	Purpose	Data Categories	
Consent	We have permission from you after we gave you all the relevant information. All of your data protection rights may apply, except the right to object. You have the right to withdraw your consent at any time.	<ul style="list-style-type: none"> • Names and contact details • Addresses • Marketing preferences • Purchase or account history 	

Legitimate Interests	<p>We're collecting or using your information because it benefits you, our Organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:</p> <ul style="list-style-type: none"> - Making suggestions and recommendations to you about goods and services that may be of interest to you. Where required we will seek your consent for any electronic direct marketing. We have a legitimate interest in developing our goods and services and grow our business. 	<ul style="list-style-type: none"> • Website user journey information
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Our lawful bases for collecting or using personal information to **comply with legal requirements**:

To comply with legal requirements			Operation of client or customer accounts
Lawful Basis	Purpose	Data Categories	
Legal Obligation	<p>We have to collect or use your information so we can comply with the law. All of your data protection rights may apply, except the right to erasure, the right to object and the right to data portability.</p>	<ul style="list-style-type: none"> • Contact information • Identification documents • Client account information • Any other personal information required to comply with legal obligations 	

Our lawful bases for collecting or using personal information for **dealing with queries, complaints or claims** are:

Operation
of client
or
customer
accounts

For dealing with queries, complaints or claims		
Lawful Basis	Purpose	Data Categories
Contract	We have to collect or use the information so we can enter into or carry out a contract with you. All of your data protection rights may apply except the right to object.	
Legitimate Interests	<p>We're collecting or using your information because it benefits you, our Organisation or someone else, without causing an undue risk of harm to anyone. All of your data protection rights may apply, except the right to portability. Our legitimate interests are:</p> <ul style="list-style-type: none"> - Firstly, it allows us to improve our customer service by understanding and addressing concerns. Secondly, it helps protect our business by mitigating potential legal risks and ensuring compliance with relevant regulations. Thirdly, it enhances operational efficiency by streamlining processes, saving time and resources, and enabling our Organisation to function smoothly. This processing is necessary to balance the needs of our Organisation with the rights and interests of the individual, ensuring that both parties benefit from effective and efficient issue resolution. 	<ul style="list-style-type: none"> • Names and contact details • Account information • Customer or client accounts and records • Financial transaction information • Correspondence

Where we get personal information from

- Directly from you
- Suppliers and service providers

How long we keep information

We will only retain your personal data for as long as necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, accounting, or reporting requirements.

To determine the appropriate retention period for personal data, we consider the amount, nature, and sensitivity of the personal data, the potential risk of harm from unauthorised use or disclosure of your personal data, the purposes for which we process your personal data and whether we can achieve those purposes through other means, and the applicable legal requirements.

Details of retention periods for different aspects of your personal data are available in our retention policy which you can request from us by [contacting](#) us.

For example:

- We keep customer account information for as long as your agreement with us continues or for as long as it is necessary to deliver our services.
- We will keep a record of the fact that you have asked us not to send you direct marketing, so that we can respect your request in future. If you unsubscribe from receiving direct marketing, then we will remove your details from our direct marketing mailing list.
- We will keep the usage information and analytics data relating to your use of the services to understand how people use our services. We will do this through the use of cookies and tracking technologies to provide us with user analytics data to improve our services and enhance your user experience. More information about the retention period of cookies can be found in our Cookie Policy.
- Sometimes business and legal requirements oblige us to retain certain information, for specific purposes, and for an extended

period of time. Reasons we might retain some data for longer periods of time include security, fraud prevention, financial record-keeping, complying with legal or regulatory requirements, ensuring the continuity of our services, and when you have had direct communications with us.

Who we share information with

Others we share personal information with

- Debt collection agencies
- Other financial or fraud investigation authorities (for example HMRC)
- Insurance companies, brokers or other intermediaries
- Professional or legal advisors
- Insolvency practitioners
- External auditors
- Firms we're legally obliged to share personal information with
- Professional consultants
- Accounting software for the provision of our bookkeeping services (for example, Xero Accounting, Sage, Quickbooks).
- Website hosting providers (such as GoDaddy).

International Transfers

We may need to transfer your personal data outside of the UK or the European Economic Area (EEA).

We will always ensure you are made aware prior to the commencement of international transfers and will make sure appropriate safeguards are in place. We will provide you with further information including how to obtain a copy of the appropriate safeguard on request by using the [contact details](#) above.

In the event personal data is sent outside of the UK or the EEA we will ensure that we safeguard your privacy rights. The relevant safeguard will usually be:

- To a country or sector that has a UK data bridge (also known as Adequacy Regulations). A list of countries the UK has deemed as adequate are available [here](#).
- Where personal data is transferred to a location that is not subject to an adequacy decision by the European Commission or the UK government, we would rely on the [EU Standard Contractual Clauses](#) for the transfers from the EU, or the [International Data Transfer Agreement](#) or [International Data Transfer Addendum to the EU Standard Contractual Clauses](#) for the transfers from the UK, or relying on such other data transfer mechanisms as available under applicable data protection laws.

How to complain

If you have any concerns about our use of your personal data, you can make a complaint to us using the contact details at the top of this privacy notice.

If you remain unhappy with how we've used your data after raising a complaint with us, you can also complain to the ICO.

The ICO's address:

Information Commissioner's Office
Wycliffe House
Water Lane
Wilmslow
Cheshire
SK9 5AF

Helpline number: 0303 123 1113

Website: <https://www.ico.org.uk/make-a-complaint>

Customer Privacy Notice Updates

We may update this Customer Privacy Notice from time to time. We will inform you in the event there are updates to this Customer Privacy Notice. The latest version of this Customer Privacy Notice will be detailed below.

Last updated

16 November 2024