



Optiworks Solutions Privacy Policy

Last Updated: 27th April 2024

This privacy notice tells you what to expect us to do with your personal information.

Our Contact Details

1. Optiworks Solutions Limited is a limited company registered in England and Wales under company number 15495468 and have our registered office at 4 London Road, Blewbury OXON OX11 9NX.
2. Optiworks Solutions is the data controller or processor (as appropriate) and is referred to as the “Company”, “we”, “us” or “our” in this policy Our full details are:

Full name: Optiworks Solutions Limited

Email: info@optiworks.co.uk

What Information We Collect, Use, and Why

3. We collect or use the following information to **provide services and goods, including delivery**:
 - a. Names and contact details
 - b. Addresses
 - c. Purchase or account history
4. Payment details (including card or bank information for transfers and direct debits)
 - a. Account information
 - b. Website user information (including user journeys and cookie tracking)
 - c. Records of meetings and decisions
 - d. Information relating to compliments or complaints
5. We collect or use the following information for **the operation of customer accounts and guarantees**:
 - a. Names and contact details
 - b. Addresses
6. Payment details (including card or bank information for transfers and direct debits)
 - a. Purchase history
 - b. Information used for security purposes
 - c. Marketing preferences



7. We collect or use the following information for **service updates or marketing purposes**:
 - a. Names and contact details
 - b. Marketing preferences
 - c. Purchase or viewing history
 - d. Website and app user journey information
8. We collect or use the following information to **comply with legal requirements**:
 - a. Financial transaction information

Lawful Basis for Collecting or Using Personal Data

9. Consent must be freely given, specific, informed and unambiguous. In order to obtain freely given consent, it must be given on a voluntary basis.
10. Contract means processing your data where it is necessary for the performance of a contract to which you are a party or to take steps at your request before entering into such a contract.
11. Legal obligation means processing your personal data where it is necessary for compliance with a legal obligation that we are subject to
12. Legitimate Interest means the interest of our business in conducting and managing our business to enable us to give you the best service/product and the best and most secure experience. We make sure we consider and balance any potential impact on you (both positive and negative) and your rights before we process your personal data for our legitimate interests. We do not use your personal data for activities where our interests are overridden by the impact on you (unless we have your consent or are otherwise required or permitted to by law). You can obtain further information about how we assess our legitimate interests against any potential impact on you in respect of specific activities by contacting us.
13. Our lawful basis for collecting or using personal information to **provide services and goods** are:
 - a. Consent
 - b. Contract
 - c. Legal obligation
14. Our lawful basis for collecting or using personal information for **the operation of customer accounts and guarantees** are:
 - a. Consent



- b. Contract
- c. Legal obligation

15. Our lawful basis for collecting or using personal information for **service updates or marketing purposes** are:

- a. Consent
- b. Legitimate interest:

16. Our lawful basis for collecting or using personal information for **legal requirements** are:

- a. Consent
- b. Contract
- c. Legal obligation

Cookies

17. Optiworks Solutions uses cookies to distinguish users. When a cookie is placed on your hard drive by Optiworks Solutions, it is intended to gather information about your use of the web site or service you are using at that time. This helps us ensure that you are provided with a good experience when you browse our website or use our services. The type of cookies we use can be broken down as follows:

- a. Strictly necessary cookies that are required for the operation of our website. For example, cookies that enable you to log in to our secure areas.
- b. Functionality cookies that are used to recognise you when you return to our site and display the site according to your preferences and feature selections.

Links to Other Sites

18. Please note that our terms and conditions and our policies will not apply to other websites that you are able to access, via a link from our site. We have no control over how any other website collects, stores or uses your data. We advise you to check the privacy policies of any such websites before providing any data to them.

How Personal Data is Collected

19. We use different methods to collect data from and about you including through:

a. Direct interactions

You may give us your Admin and Transaction Data by filling in forms or by corresponding with us by post, phone, email, live chat or otherwise. Your Users may give us User Data, Usage Data and Technical Data by using our websites or services. This includes personal data provided when:

- i. You make an enquiry about a product or service;
- ii. User accounts are created on our sites;



- iii. You subscribe for any services;
- iv. Data is uploaded to our systems as part of the services that we provide to you;
- v. Marketing or other information is requested to be sent to you by us or a third party (such as requests for marketing information you have requested by attending an affiliated event);
- vi. You complete a survey; or
- vii. You or your Users give us feedback or contact us.

b. Third party services

We will receive personal data about you from various third parties, including:

- i. Wix is our CMS. Your data including name, email address, contact number, history of site interactions and stated marketing preferences is stored on Wix. It is used to provide service information to you which may help you make a selection of a supplier. Wix's Privacy Policy is published here <https://www.wix.com/about/privacy>
- ii. Tide which is used to maintain billing and financial information. Your data including name, email address and contact number will be added to the customer record to maintain our supplier relationship to you. Tide's Privacy Policy is published here <https://www.tide.co/privacy/>
- iii. Google which may provide us with Technical Data about your visit to our website via its analytics service. Google's privacy policy is published here <https://www.google.com/policies/privacy/partners/>.
- iv. Third Party Partners of Optiworks Solutions

How Long We Keep Information

20. We will retain your personal data for as long as reasonably necessary to fulfil the purposes we collected it for, including for the purposes of satisfying any legal, regulatory, tax, accounting or reporting requirements. We may retain your personal data for a longer period in the event of a complaint or if we reasonably believe there is a prospect of litigation in respect to our relationship with you.
21. 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, regulatory, tax, accounting or other requirements.
22. By law we must keep basic information about our customers (including Contact, Identity, Financial and Transaction Data for six years after they cease being a customer for tax purposes.
23. In particular:
 - a. Personal data will be retained for a maximum of 2 years after the termination of a contract;
 - b. Financial transactions will be retained in line with current HMRC regulations;
 - c. Data provided for an event held by Optiworks Solutions will be retained for 6 months following the event;
 - d. Marketing contacts will be retained for a maximum of 12 months where no contact has been made.



Who We Share Information With

24. Data Processors:

- a. Triaster Limited: This data processor does the following activities for us:
Provide process management software.

25. Other Organisations:

- a. Professional consultants
- b. Other relevant third parties:
 - i. LS Lean Consulting Limited
 - ii. Digital Peak

Your Data Protection Rights

26. Under data protection law, you have rights including:

- a. **Your right of access** - You have the right to ask us for copies of your personal data.
- b. **Your right to rectification** - You have the right to ask us to rectify personal data you think is inaccurate. You also have the right to ask us to complete information you think is incomplete.
- c. **Your right to erasure** - You have the right to ask us to erase your personal data in certain circumstances.
- d. **Your right to restriction of processing** - You have the right to ask us to restrict the processing of your personal data in certain circumstances.
- e. **Your right to object to processing** - You have the right to object to the processing of your personal data in certain circumstances.
- f. **Your right to data portability** - You have the right to ask that we transfer the personal data you gave us to another organisation, or to you, in certain circumstances.
- g. **Your right to withdraw consent** – When we use consent as our lawful basis you have the right to withdraw your consent.



27. You don't usually need to pay a fee to exercise your rights. If you make a request, we have one calendar month to respond to you.
28. To make a data protection rights request, please contact us using the contact details at the top of this privacy notice.

How to Complain

29. 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.
30. 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>