

# Credit Account Customer Communication & Data Storage

All methods of Communication & Data Storage relating to a customer with a credit account.

## Placing an Order on our Website

*Data Held:* Full Name, Email, Phone, Billing Address, Delivery Address, Company Name

*Shared with:* The supplier of the product and the courier they may use to deliver the product.

*Lawful Basis:* Consent, Legal Obligation, Legitimate Interests

*Purpose of stored data:* To be able to process a customer order, deliver the products to the right place, confirm customer details for warranty enquiries or future repeat orders of the same product. The data is also stored to give the customer ease of access to their account and see their order history with us. Legally, the data must be stored for 7 years for financial reasons and up to 12 years for warranty purposes. You will also receive an email regarding signing up to our newsletter under legitimate interests, if you ignore this email you will not be added to the list.

## Placing an Order directly over the phone

*Data Held:* Emails, company name, billing/delivery address, card details, phone number

*Shared with:* The supplier of the product and the courier they may use to deliver the product.

*Lawful Basis:* Consent, Contract, Legal Obligation

*Purpose of stored data:* To be able to process a customer order, deliver the products to the right place, confirm customer details for warranty enquiries or future repeat orders of the same product. The data is also stored to give the customer ease of access to their account and see their order history with us. Legally, the data must be stored for 7 years for financial reasons and up to 12 years for warranty purposes.

## General Enquiries over the phone

*Data Held:* Company Name, Phone Numbers, Name, Email

*Shared with:* Nobody

*Lawful Basis:* Consent

*Purpose of stored data:* We temporarily keep the data if we need to get back in contact whilst we talk to the supplier to find out more details.

21 May 2018

## Emailing regarding a quote

*Data Held:* Full name, Email, Company Name, Phone number, Delivery Address, Billing Address, Card Address

*Shared with:* Nobody

*Lawful Basis:* Consent, Legal Obligation

*Purpose of stored data:* We temporarily keep the data if we need to get back in contact whilst we talk to the supplier to find out more details.

## Email via Website Contact Form

*Data Held:* Contact Name, Company Name, Email, Telephone Number, the message within the form

*Shared with:* Teamwork Desk our 3<sup>rd</sup> party Ticketing Platform

*Lawful Basis:* Consent

*Purpose of stored data:* To be able to open a line of communication with the individual through our ticketing system to be able to help with the enquiry.

## Emailing with a purchase order

*Data Held:* Full name, Email, Company Name, Phone number, Delivery Address, Billing Address, Card Address, Signature

*Shared with:* The supplier of the product and the courier they may use to deliver the product.

*Lawful Basis:* Consent, Contract, Legal Obligation

*Purpose of stored data:* To be able to process a customer order, deliver the products to the right place, confirm customer details for warranty enquiries or future repeat orders of the same product. The data is also stored to give the customer ease of access to their account and be able to view their order history with us. Legally, the data must be stored for 7 years for financial reasons and up to 12 years for warranty purposes.

## Purchase Order by Fax

*Data Held:* Full name, Email, Company Name, Phone number, Delivery Address, Billing Address, Card Address, Signature

*Shared with:* The supplier of the product and the courier they may use to deliver the product.

*Lawful Basis:* Consent, Contract, Legal Obligation

*Purpose of stored data:* To be able to process a customer order, deliver the products to the right place, confirm customer details for warranty enquiries or future repeat orders of the same product. The data is also stored to give the customer ease of access to their account and be able to view their order history with us. Legally, the data must be stored for 7 years for financial reasons and up to 12 years for warranty purposes.

## Live Chat

*Data Held:* Full Name, Number, Email, Billing Address, Delivery Address, Any other information stated within the chat

*Shared with:* Zendesk our 3<sup>rd</sup> party Email marketing platform

*Lawful Basis:* Consent

*Purpose of stored data:* For us to be able to assist with general enquiries and resolve them. This data will be deleted on a routine basis.

## Purchase Order Letter

*Data Held:* Full name, Email, Company Name, Phone number, Delivery Address, Billing Address, Card Address, Fax Number, Signature

*Shared with:* The supplier of the product and the courier they may use to deliver the product.

*Lawful Basis:* Consent, Contract, Legal Obligation

*Purpose of stored data:* To be able to process a customer order, deliver the products to the right place, confirm customer details for warranty enquiries or future repeat orders of the same product. The data is also stored to give the customer ease of access to their account and be able to view their order history with us. Legally, the data must be stored for 7 years for financial reasons and up to 12 years for warranty purposes.

## Cheque by post

*Data Held:* Nothing

*Shared with:* Nobody

*Lawful Basis:* N/A

*Purpose of stored data:* The cheque is removed from the envelope, processed and shredded.

## Registering for an Account

*Data Held:* First Name, Last Name, Email, Phone Number, Fax, Company, Address

*Shared with:* Nobody

*Lawful Basis:* Consent

*Purpose of stored data:* To be able to track existing or past orders within an admin panel using the details provided.

21 May 2018

## Signing up to our Newsletter via our Website

*Data Held:* First Name, Last Name, Email

*Shared with:* Mailchimp our 3<sup>rd</sup> party Email marketing platform

*Lawful Basis:* Legitimate Interests

*Purpose of stored data:* To be able to send emails with the latest offers or newest products. This interests both parties involved as the subscriber may be waiting for the perfect offer to come along and for us it means a potential customer. If the subscriber is no longer interested they can easily unsubscribe at any time.