



Codat Global Privacy Notice

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Preamble

Thank you for visiting the Codat website. The aim of this privacy notice (“Privacy Notice”) is to clearly explain what, how and why we collect the information about you and what we do with that information.

We recognize that when you provide us with information about yourself or for your business, that you trust us to act in a responsible manner and we are committed to making sure we earn that trust. We take your privacy extremely seriously, and we will not sell any information we collect nor will we share it with third party organizations unless you provide clear consent or if required by applicable laws or for a valid legal reason.

What is Codat?

Codat is focused on making financial integrations as simple as a click of a button. We build developer-friendly infrastructure that give businesses the ability to create their own next-generation products.

Having experienced the pain of managing integrations with multiple accounting and financial software providers we decided to build a product to make this process as quick and easy as possible.

Acting as a data processor with regards to our product and a data controller with regards to our marketing website, for the personal data involved when you use or visit our website or communicate with us, or transact with a business whilst using our products and services, our contact details are:

Codat Ltd.
190 Exmouth House
3-11 Pine Street
London EC1R 0JH

info@codat.io

Contact our Data Protection Officer or exercise your data protection Rights (including your right to [object](#))

Our clients who use our software services are data controllers. If you have questions about how data controllers handle your personal data, or if you wish to exercise your rights for the personal data they hold, please contact them directly.

What personal data do we collect?

Visitors

We collect personal data when you use our website, make an inquiry or communicate with us. This includes:

- **Information about your use of our online content and emails**, such as how you came to our website, which pages you visit, how long you remain on a page or view content, and whether you opened an email or clicked a link. To collect this data, we use [cookies and other tracking technologies](#).
- **Information provided when you communicate with us by phone, email, webform or chat**, including records of your contact, your country and language, your email address or other contact information, and other information about the reasons for the communication.

- **Business information that tells us more about our prospective customers and businesses**, from introducers, third party companies and other data enrichment sources, and from public sources like Companies House, LinkedIn or Twitter.
- **Marketing preferences**, such as whether you have agreed to receive marketing information or newsletters about our services or whether you have opted out, and the types of services that may interest you.
- When you choose to **submit a CV or business plan** to us, you are voluntarily giving us information that may include personal data. We will use the information you provide to provide a service, only in the context in which you have contacted us about.

Codat's clients

With regard to our clients, we sometimes collect personal data when you enquire about, set up, administer and use a Codat account.

This may include information about your company's employees, directors, trustees or beneficial owners.

Identification information, such as your name, company name, email address, phone number, birthdate, address details and in connection with an account sign-in facility, your log-in and password details.

Device and connection information, such as the type of device you use to access our services, operating system and version, device identifiers, network information, login records, IP address and location derived from it.

End-users of the Codat product

For those businesses that consent to authorise Codat's clients to access their data held within third-party applications, we sometimes process the following data:

Identification information, such as your name, company name, email address, phone number, date of birth, address details and in connection with an account sign-in facility, your log-in and password details.

Financial information. Our clients, acting as Data Controllers, can choose the frequency with which they access this data; this can include bank account details, general company information, financial reports, bank statements, credit notes, invoices, and any other personal and financial details that are recorded in the third-party applications you have authorised them to access.

Transaction information, details of transactions made by you; such as the names of transacting parties, a transaction description, payment amounts, billing and the devices and payment methods used to complete the transactions.

Device and connection information, such as the type of device you use to access our services, operating system and version, device identifiers, network information, login records, IP address and location derived from it.

How do we use personal data?

Using personal data to provide our services

We use personal data where it is necessary to provide our services to our clients in line with their instructions.

- We use personal data **to communicate with you**, like sending system notifications, alerting you to changes in the service, or providing **customer support**.
- We use personal data to **prevent unauthorised use of our services**. We may block access to users if we believe their use will violate our terms.
- Furthermore, our **website may contain links to other sites**, terms of use of which will not be covered by this Privacy Statement. Please note Codat is not responsible for the content or practices of any of these other websites. We keep our Privacy Notice under regular review and we may place any updates on this webpage.

Using personal data for our legitimate interests

We use personal data for our legitimate business interests. When we do, we make sure we understand and work to minimise its privacy impact. For example, we limit the data to what is necessary, control access to the data, and where we can, aggregate or de-identify the data.

- We use personal data to **develop and improve our products and services**. For example, we might use data to:
 - Analyse how people engage with our website and services so that we can develop new products or features.
- We use personal data to **promote our services**, communicate news and industry updates, and host or participate in events.
- Where we believe it is necessary to **protect our legal rights and interests** and the interests of others, we use personal data in connection with legal claims, compliance, regulatory and audit functions, and in connection with the acquisition, merger or sale of a business.

Using personal data where required by law

We use personal data to comply with the requirements of law we operate under, and as required in other exceptional circumstances.

- Under **exceptional circumstances**, we may be required by law to provide personal data to law enforcement agencies, courts or others in connection with claims and other litigation.

How is personal data shared?

- You are under no obligation to Codat to provide any personal data. However, if you should choose to withhold requested information, we may not be able to provide you with certain services.
- Codat works with third parties **who integrate our software services into their applications**. You are under no obligation to provide any such information. However, if you should choose to withhold requested information, we may not be able to provide you with certain services.
- If ownership or control of all or part of our business or assets changes, we may transfer personal data to the **new owner**. If the owner will use the data for purposes other than those disclosed here, they will take the steps required by law to ensure such purposes remain lawful.
- We may work with **service providers** who have access to personal data when they provide us with services, like technical infrastructure, web and app development, and marketing, analytics and survey tools. We impose strict restrictions on how service providers store, use and share data on our behalf. We also work with companies who provide identity verification, background screening, due diligence, consulting and other regulatory services for us.
- In exceptional circumstances, we share personal data with **government agencies and other third parties** if we believe it is reasonably necessary to comply with law, regulation, legal process or governmental request; to enforce our agreements, policies and terms; to protect the security of our services; to protect Codat and customers or the public from harm or illegal activities; or to respond to an emergency.

International transfers

Codat's services are offered from our United Kingdom headquarters. For Codat clients operating outside of the EU, personal data may also be stored and accessed by service providers located in other countries in the European Union.

When we work with a service provider or a Codat subsidiary, we look for a legal mechanism that requires them to protect data to EU standards. For example, the service provider has signed on to the EU-US Privacy Shield, operates under EU-approved binding corporate rules, or is in a country the EU recognises as having adequate data protection laws. Where no other legal mechanism exists, we enact the EU-approved standard contractual data protection clauses in our contracts.

Our services are available in a number of countries around the world. If you use our services in a non-EU country, personal data will be transferred as necessary to complete this transaction.

Your rights and choices

Most of the data we collect and the purposes we use it for are necessary for us to operate and improve our services or comply with our obligations as a data processor. We tell you in the service where you can make a choice or grant consent. When you grant consent, you may **withdraw it** at any time to stop any further processing. You can also ask us at any time not to send or to carry out direct marketing, or to stop using certain kinds of cookies.

You may have certain rights under data protection law. These include the right to **ask Codat for a copy** of your personal data, to **correct, delete** or **restrict** processing of it, and to **obtain personal data in a format you can share with a new provider**. You may have the right to **object** to processing. These rights may be limited in some situations – for example, where we can demonstrate that we have a legal requirement to process your data.

Exercise your data protection rights

We would like it that you came to us in the first instance with any form of complaint. However, if you have unresolved concerns, you have the right to complain to an EU data protection authority where you live or work, or where you believe a breach may have occurred. In the UK that will be:

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

ICO website: www.ico.org.uk

How long do we keep personal data?

Codat will retain any personal data that you voluntarily provide during the course of your interactions with us in providing our services and in line with our retention policies.

We also keep personal data for other legitimate business purposes, such as complying with our legal obligations, resolving disputes, security reasons, and enforcing our agreements. Because these needs can vary for different data types used for different purposes, retention times will also vary. All personal data will be destroyed or deleted at the end of its retention period in accordance with our retention and secure disposal policy. However, no data will be stored for longer than 10 years.