

B3 Communications Integration Privacy Policy

This policy explains how the integration uses contact and caller information, how it relates to B3's general Privacy Policy, and how a connected business or individual can raise a privacy request.

1. Introduction and relationship with B3's main policy

1.1 This policy explains the personal data handled by the CallSwitch One–QuickBooks Online integration (the “App”) supplied by B3 Communications Ltd (“B3”, “we” or “us”). It supplements B3's general Privacy Policy at <https://b3communications.co.uk/legal-information/> for this particular App. Where the two policies describe different retention or technical practices, this App-specific policy describes the App.

1.2 The App is supplied to business customers. A telephone number and a business contact name can still be personal data where they identify an individual. The connected business ordinarily decides why it holds and uses its customer records and caller data; B3 processes that data to provide the App on the business's behalf. B3 may separately determine how it handles its own account, support and security records.

2. Information received and where it comes from

2.1 From the connected QuickBooks Online company, the App reads customer contact information needed to identify a caller, including customer names, telephone numbers and associated contact details available for the lookup.

2.2 From CallSwitch One, the App receives the telephone number associated with an incoming or outgoing call at the time of the call. We also hold the QuickBooks Online authorisation credentials needed to maintain the connection, and may handle limited technical information needed to operate and secure it.

2.3 The App is designed for contact matching. It does not intentionally collect call recordings or call content, and it does not create, amend or delete QuickBooks Online financial records. The permissions presented by QuickBooks Online when the App is connected should be reviewed by the person authorising access.

3. How the information is used

3.1 The App compares the caller number with the connected business's customer contact information and makes a matching customer record available to an authorised user. It maintains a copy of names and telephone numbers for this matching and refreshes that copy periodically.

3.2 B3 uses connection credentials to obtain authorised access and technical information to operate, maintain and protect the App. We do not use the connected business's customer contact data for our own marketing or sell it.

3.3 A match is a lookup result, not an identity verification or a decision with legal or similarly significant effects. The connected business remains responsible for verifying a caller before disclosing information or changing an account.

4. Who is responsible for privacy information and lawful use

4.1 For customer and caller information supplied through its accounts, the connected business is ordinarily the controller and is responsible for identifying an appropriate lawful basis, informing the people concerned and handling their rights requests. B3 acts as processor for the matching service under the App Agreement.

4.2 Where B3 handles contact details of an account administrator or support contact for its own account management, security or legal purposes, B3 is the controller. Depending on the purpose, B3 relies on performance of a contract, compliance with legal obligations or its legitimate interests in providing and protecting its services. We do not rely on a customer's act of connecting the App as consent from every person in its address book.

5. Sharing and service providers

5.1 The App communicates with QuickBooks Online and CallSwitch One to provide the connection requested by the business. Authorised users of that business may see a matched record according to their access permissions. B3 may use hosting, infrastructure and technical-support providers that process data under appropriate confidentiality and security obligations.

5.2 We may disclose information where required by law or to protect the security and legal rights of B3 or others. We do not sell customer contact data. Details of the providers used for the App and the locations in which they process data are available from B3 on request.

6. International transfers

6.1 The location of processing depends on the connected platforms and any infrastructure providers used for the App. Where B3 makes a restricted transfer of personal data outside the UK, it shall use an applicable adequacy arrangement or another lawful safeguard, such as the UK International Data Transfer Agreement or the UK Addendum where appropriate. Information about a safeguard applicable to a particular transfer may be requested using the contact details below.

7. Security

7.1 B3 applies technical and organisational measures appropriate to the nature of the data and restricts access to people who need it to operate or support the App. Authorisation credentials are stored for the purpose of maintaining the connection and must not be disclosed to unrelated parties.

7.2 The connected business must manage its authorised users and the security of its QuickBooks Online and CallSwitch One accounts. Suspected unauthorised access affecting the App should be reported promptly to hello@b3communications.co.uk.

8. Retention and disconnection

8.1 A copy of customer names and telephone numbers is held while the connection is active and refreshed as needed for matching. B3 stops further access when the connection is disconnected and removes active connection credentials and the active contact cache as part of disconnection. Information held in protected backups, if any, remains inaccessible for ordinary use until overwritten under the applicable backup cycle.

8.2 Limited support or security records may be retained for as long as reasonably required for their purpose and any legal obligations. B3's general Privacy Policy describes retention for other B3 services; it should not be read as requiring the App's live contact cache to be kept for seven years after disconnection.

8.3 Disconnecting the App does not itself delete the source customer records in QuickBooks Online or the source call information in CallSwitch One.

9. Individual rights and requests

9.1 Individuals may have rights to access, correct, erase, restrict or object to processing of their personal data and, in some circumstances, to data portability. If the request concerns a business's customer record or call information, contact that business first; it controls the source data and decides how to respond. B3 will assist it as required by applicable law and the App Agreement.

9.2 If B3 is the controller for your own account or support information, contact hello@b3communications.co.uk to exercise an applicable right. You also have the right to complain to the Information Commissioner's Office at ico.org.uk.

10. Changes and contact

10.1 B3 may update this policy when the App or applicable law changes. We will update the effective date and give notice of material changes where appropriate.

10.2 Questions about this policy or B3's processing may be sent to hello@b3communications.co.uk. B3's main Privacy Policy and other legal documents are at <https://b3communications.co.uk/legal-information/>.