



PRIVACY POLICY

Tools2Done

Owned and operated by Created2Deliver Ltd

LAST UPDATED: 08/09/2026

VERSION 1.0

1. About this Privacy Policy

Tools2Done is a business management software platform provided by Created2Deliver Ltd ("Created2Deliver", "we", "us" or "our").

This Privacy Policy explains how we collect, use, store, share and protect personal information when individuals:

- visit the Tools2Done website;
- create or use a Tools2Done account;
- subscribe to or pay for Tools2Done;
- contact us for support;
- connect third-party services such as Open Banking providers; or
- otherwise interact with us.

It also explains the circumstances in which we act as a data controller and when we act as a data processor on behalf of our business customers.

This policy is intended to operate alongside our contractual terms, Data Processing Agreement, Cookie Policy and any other privacy information we provide.

2. Who we are

Tools2Done is owned and operated by:

Company	Created2Deliver Ltd
Company number	17445177
Registered office	29 Whitecliffe View, Chepstow, NP165WJ
Privacy contact	privacy@tools2done.co.uk

For personal information that we control, Created2Deliver Ltd is the data controller.

3. When we are a controller and when we are a processor

Created2Deliver Ltd generally acts as data controller for information relating to:

- Tools2Done account holders and account administration;
- subscription and billing administration;
- account security, login records and security logs;
- communications with us and customer support;
- service administration, product improvement and fraud prevention;
- legal and regulatory compliance;
- website analytics, cookies and marketing communications where applicable.

Businesses using Tools2Done may enter or import personal information relating to their own customers, prospective customers, employees, workers, subcontractors, suppliers, business contacts, invoice recipients, payees and bank transaction counterparties.

In those circumstances, the subscribing business normally determines why that information is processed and is therefore the data controller. Created2Deliver Ltd ordinarily processes that information on the customer's behalf as a data processor.

Our customers are responsible for ensuring that they have a lawful basis for entering, uploading, importing or otherwise processing personal information through Tools2Done.

4. Personal information we may collect

Account and identity information

- name
- business name
- email address
- telephone number
- username and account identifiers
- user role
- subscription plan
- business type

Business information

- trading details
- company information
- addresses
- VAT information
- tax-related settings
- business preferences
- accounting settings

Customer and contact information

- customer names
- addresses
- email addresses
- telephone numbers
- job addresses
- quotations
- invoices
- project notes
- correspondence

Workforce and subcontractor information

- employee or worker names
- addresses and contact details
- payroll and payment information
- CIS information
- UTR numbers
- wage records
- pension and employment-related records

Financial and accounting information

- invoices
- payments
- expenses
- purchase records
- supplier information

- transaction amounts and descriptions
- bank account information
- bank balances
- reconciliation information
- tax and accounting records

Open Banking information

Where a user chooses to connect a bank account through an Open Banking provider, Tools2Done may receive information made available under that consent, including:

- bank or financial institution
- account name and type
- account identifier and partial account number
- account balance
- transaction dates and descriptions
- transaction amounts
- merchant or counterparty information

We do not require users to provide their online banking passwords directly to Tools2Done. Open Banking connections may be facilitated by a regulated third-party provider such as TrueLayer.

Billing information

Payments for Tools2Done may be processed by a specialist payment provider such as Stripe. We may receive billing name and email, subscription status, payment status, payment references and limited payment-method information. We do not normally receive or store full card numbers where payment details are handled directly by the payment provider.

Technical, security and support information

- IP address
- browser and device information
- login timestamps
- failed login attempts
- audit and security logs
- server logs
- session identifiers
- diagnostic information
- support emails, screenshots and troubleshooting records

5. How we obtain personal information

- directly from users;
- from businesses that use Tools2Done;
- when information is uploaded into the platform;
- from connected bank accounts through Open Banking;
- from payment processors and authorised integrations;
- automatically through technical and security logs;
- through communications with us.

Where information is obtained from somebody other than the individual concerned, the relevant business using Tools2Done may itself be responsible for providing appropriate privacy information to that individual.

6. How we use personal information

- provide, administer and secure Tools2Done;
- create and authenticate accounts;
- provide quotation, invoicing, job-management, expense and accounting features;
- provide bank-feed and reconciliation functionality;
- provide payroll, CIS and workforce features;
- process subscriptions and payments;
- provide customer support and diagnose technical problems;
- prevent fraud, abuse and unauthorised access;
- perform backups, disaster recovery and system maintenance;
- maintain audit and security logs;
- improve reliability and functionality;
- communicate service information;
- enforce contractual terms;
- meet legal and regulatory obligations;
- establish, exercise or defend legal claims.

We will not use customer business data for unrelated purposes merely because we are technically able to access it.

7. Our lawful bases

Contract

We process information where necessary to create and administer an account, provide Tools2Done, manage subscriptions, provide requested support and fulfil our contractual obligations.

Legitimate interests

We may process information where necessary for legitimate interests including operating and improving the service, protecting our systems, preventing fraud, diagnosing faults, maintaining appropriate business records and protecting legal rights. We consider whether those interests are outweighed by the rights and interests of individuals.

Legal obligation

We may process information where required to comply with applicable law, regulatory requirements, court orders or lawful requests.

Consent

Where consent is the appropriate lawful basis, we will obtain it before processing and users may withdraw that consent where the law provides. A user may, for example, actively choose whether to authorise an Open Banking connection.

8. Open Banking and TrueLayer

If you choose to connect a bank account to Tools2Done, the connection may be facilitated by TrueLayer or another authorised Open Banking provider.

You will normally be redirected to the relevant bank or authorised provider to approve the connection. Tools2Done may then receive authorised account information through the provider.

We use this information to provide features such as:

- displaying connected accounts

- displaying account balances
- importing transactions
- matching receipts and expenses
- reconciling payments
- categorising transactions

A connected bank account remains subject to the permissions authorised by the account holder and the applicable Open Banking arrangements.

You may disconnect a bank connection through Tools2Done, although previously imported accounting records may need to be retained where necessary for business, contractual or legal purposes.

9. Support access to customer data

Because Tools2Done is a hosted software service, authorised personnel may have technical access to customer information.

We do not permit customer information to be accessed simply out of curiosity or for unrelated purposes.

Access should only take place where reasonably necessary for matters such as:

- responding to a customer support request
- investigating a fault or integration issue
- maintaining security
- preventing fraud
- recovering data
- complying with legal obligations
- protecting the integrity of the service

We aim to restrict privileged access to authorised persons and to use technical and organisational controls appropriate to the risk. Where practical, diagnostic access is carried out on a read-only or least-privilege basis.

10. Who we share information with

We may share information with carefully selected service providers where necessary to operate Tools2Done, including providers of:

- cloud hosting and infrastructure
- database hosting, backups and storage
- email delivery
- payment processing
- Open Banking
- security, monitoring and diagnostics
- professional, accounting and legal services

Current or anticipated providers may include Hetzner for infrastructure and hosting, TrueLayer for Open Banking connectivity and Stripe for subscription payment processing.

We may also disclose information where required by law, to regulators or law-enforcement bodies where legally required, to professional advisers, in connection with legal proceedings, or as part of a legitimate corporate sale, restructuring or acquisition subject to appropriate safeguards.

We do not sell customer personal data.

11. Sub-processors

Where Created2Deliver Ltd acts as a processor, we may use third-party sub-processors to help provide Tools2Done.

We will take reasonable steps to ensure that sub-processors provide appropriate safeguards for personal data.

A current sub-processor list may be published at: [INSERT SUB-PROCESSOR URL IF USED].

12. International transfers

Some service providers may process personal information outside the United Kingdom.

Where personal information is transferred internationally, we will seek to ensure that an appropriate lawful transfer mechanism is in place where required. Depending on the circumstances, this may include UK adequacy regulations, the UK International Data Transfer Agreement, the UK Addendum to approved Standard Contractual Clauses, or another legally permitted safeguard.

13. How long we keep information

We do not retain personal information indefinitely without reason. Retention depends on the type of information, why it was collected, contractual requirements, legal and accounting obligations, security requirements and dispute-resolution needs.

Customer data will generally be retained while the relevant Tools2Done account remains active.

Following account closure, customer data may be retained for a limited closure or recovery period before secure deletion or anonymisation, unless longer retention is required by law or agreed with the customer.

Encrypted backups may continue to contain deleted information until the relevant backup expires in accordance with our backup retention cycle.

Our current operational backup retention is approximately 30 days, although this may change as our infrastructure evolves.

14. Security

We use technical and organisational measures intended to protect personal information against unauthorised access, accidental loss, alteration, unauthorised disclosure and destruction.

- encrypted backups;
- encryption of sensitive credentials and tokens;
- tenant database separation;
- access and authentication controls;
- system and security logging;
- secure transport encryption;
- off-site backups;
- restricted administrative access.

No internet-based service can guarantee absolute security. Users are responsible for protecting their usernames, passwords and account access.

15. Data separation between businesses

Tools2Done is designed as a multi-tenant service. Each provisioned business uses a logically separated tenant environment, including a separate tenant database.

We take measures intended to prevent one customer from accessing another customer's information.

16. Personal data breaches

If we become aware of a personal-data breach, we will assess the incident and take appropriate action in accordance with applicable data protection law. Where required, we will notify the relevant controller, the Information Commissioner's Office and/or affected individuals.

17. Your data protection rights

Depending on the circumstances and lawful basis, individuals may have rights including:

- the right to be informed;
- the right of access;
- the right to rectification;
- the right to erasure;
- the right to restriction of processing;
- the right to data portability;
- the right to object;
- rights relating to automated decision-making.

These rights are not absolute and may not apply in every circumstance.

Where Created2Deliver Ltd acts only as processor, requests concerning customer-entered information may need to be directed to the business that controls that information.

18. Your right to object

Where we process personal information on the basis of legitimate interests, you may have the right to object to that processing. You also have the right to object to direct marketing at any time.

19. Marketing

We may send service-related communications where necessary to operate your account.

Marketing communications will be handled in accordance with applicable electronic marketing and data-protection laws. Where required, we will obtain consent. You can unsubscribe from marketing communications at any time using the unsubscribe mechanism provided or by contacting us.

20. Cookies

The Tools2Done website and application may use cookies and similar technologies for authentication, security, session management, preferences, analytics and performance.

Where legally required, non-essential cookies will not be placed without appropriate consent.

Further information should be provided in our separate Cookie Policy.

21. Automated decision-making

Tools2Done may use automated rules to assist users with functions such as transaction categorisation, matching, reminders, suggestions and financial calculations.

Unless explicitly stated otherwise, Tools2Done does not make solely automated decisions about individuals that produce legal or similarly significant effects.

22. Children

Tools2Done is intended for use by businesses and is not directed at children.

Users should not intentionally enter children's personal information unless they have a lawful and legitimate business reason to do so.

23. Account closure and deletion

Users may request closure of their Tools2Done account in accordance with our contractual terms.

Closing an account may involve suspension of access, a limited recovery period, export opportunities, deletion of active customer data and eventual expiry of backup copies.

Some records may need to be retained where required for legal, accounting, security or dispute purposes.

24. Changes to this Privacy Policy

We may update this Privacy Policy from time to time. Material changes may be communicated through the Tools2Done website, the application, email or another appropriate communication method.

The latest version will show the date it was last updated.

25. Complaints

If you have concerns about our use of your personal information, please contact us first so that we can investigate.

You also have the right to complain to the UK supervisory authority, the Information Commissioner's Office (ICO). Current contact information is available from the ICO website.

26. Contact us

For privacy or data protection questions, please contact:

Business	Created2Deliver Ltd trading as Tools2Done
Email	privacy@tools2done.co.uk
Registered office	29 Whitecliffe view, Chepstow, NP16 5WJ
Website	https://www.tools2done.co.uk

Tools2Done • Run the work. Know the business.