



Data Protection Notice

Your personal and business information will be held by Lloyds Bank plc which is part of Lloyds Banking Group and shared within the Group and with other companies that provide services to us so that we can look after your relationship with us.

Data Protection law says that we are allowed to use personal information only if we have a proper reason to do so. This includes sharing it outside Lloyds Banking Group. We will use your personal and business information so that you can use the Lloyds Bank Business Finance Assistant and we can:

- fulfil our contract with you;
- comply with our regulatory obligations; and
- use your personal and business information where it is in our legitimate interest to do.

In certain circumstances, we may also ask for consent to process your personal and business information.

When we have a business or commercial reason of our own to use your information, this is called a 'legitimate interest'. Even then, it must not unfairly go against your interests. These legitimate interests include:

- managing our relationship with you or the business;
- developing and carrying out marketing activities;
- studying how our customers use products and services from us and other organisations; and
- communicating with you about our products and services.

Cancel

Next



Terms and Conditions

Business Banking - Lloyds Bank Business Finance Assistant Account

This agreement contains:

- An explanation of what makes up our agreement with you for the Service.
- Our terms and conditions. They say what you and we agree to do under the agreement. To help you find what you need, we list the sections under 'What's in this agreement?' table below.

Please:

- read the agreement carefully and keep it for future reference;
- ask us if you have any questions, using the contact details we provide.

1. Meaning of terms

1.1 Meaning of the words we use:

"Account Administrator": means any of your directors, officers, employees, agents or other relevant persons who manage and administer the provision of the Service and access to the Lloyds Bank Business Finance Assistant Account.

"Account Data": means all of the historical data related to your

Cancel

Agree



Please contact us if you would like this information in an alternative format such as Braille, large print or audio.

If you have a hearing or speech impairment you can use Relay UK. More information on the Relay UK Service can be found at: relayuk.bt.com.

Calls may be monitored or recorded in case we need to check we have carried out your instructions correctly and to help improve our quality of service. Please note that any data sent via e-mail is not secure and could be read by others.

Important information

Lloyds Bank plc Registered Office: 25 Gresham Street, London EC2V 7HN. Registered in England and Wales no. 2065.

We are authorised by the Prudential Regulation Authority, and regulated by the Financial Conduct Authority and Prudential Regulation Authority under Registration number 119278.

Eligible deposits with us are protected by the Financial Services Compensation Scheme (FSCS). We are covered by the Financial Ombudsman Service (FOS). Please note that due to FSCS and FOS eligibility criteria not all business customers will be covered.

Lloyds Banking Group is a financial services group that incorporates a number of brands including Lloyds Bank. More information on Lloyds Banking Group can be found at lloydsbankinggroup.com.

Cancel

Agree



Your details

Name

Phone number



Contact preferences:

We'd love to hear your feedback on how our product is working for you so that we can make it better. Please select if you are happy for us to contact your business.



Marketing preferences:

We'd like to keep your business up to date on relevant products and offers. Please select if you are happy for us to contact your business.

Please select how you want us to contact your business:



Email



Text



Phone

Back

Next



Your Business

Business Name

Business Type

Business Industry

Are you registered for VAT?

VAT number (Optional)

You can enter it later if you do not have it handy

Back

Next



Your Lloyds Bank Account Details

So that we can verify who you are, please enter your Lloyds Bank sort code and account number below.

Sort Code

Account Number

Back

Skip

Next 



Connect your Lloyds bank account

Save hours of your time by connecting your Lloyds bank account



- ✓ Import and categorise your transactions and reconcile them against your invoices, sales and expenses.
- ✓ Manage your business accounts, cash flow and understand your financial position in one place.
- ✓ Automatically generate your future tax returns and submit them to HMRC.

For security reasons we will need to ask you to re-consent to share this information every 90 days. Your next re-consent date will be 27/09/2020 .

Back

Skip

Next 



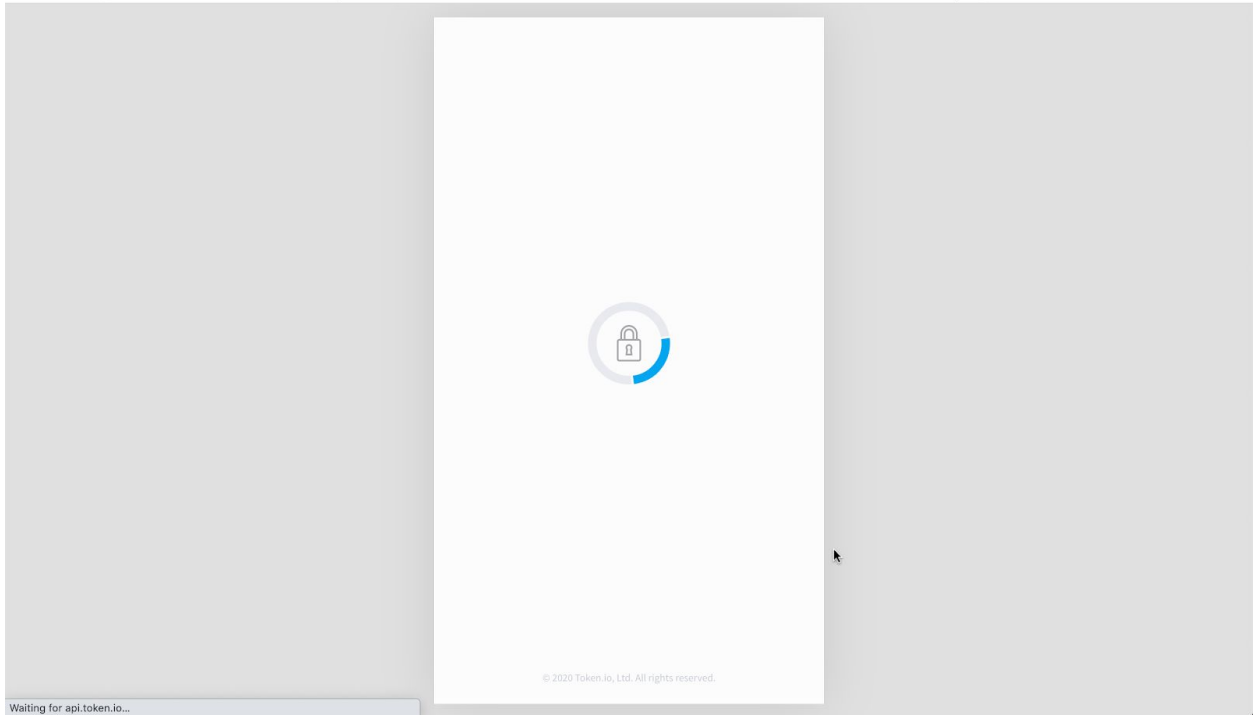
Connect your Lloyds bank account


Please select the account type

- Lloyds Bank Business
- Lloyds Bank Commercial

Back

Next



 English

Request for Account Information


For Token.io Ltd to provide you with account information services, it needs your consent to access the following information at your selected accounts at your bank:

Your Transaction History
Your Balances
Your Account Transfer Destinations

Token.io Ltd will access the above information from your selected accounts until **Sun, September 27, 2020** and will provide this information to you and OneUp who will use the same in fulfillment of its services to you.

The terms governing your use of Token's service can be found at [terms and privacy policy](#)

 None of your logon details will be shared.


You're setting up account sharing with Token.io Ltd.

Please log on to set up sharing.

Online for Business User ID:

Remember my User ID?

[Forgotten your logon details?](#)

 We will never ask you to use the 'Respond' key on your card reader when you log on.

[Cancel and go back to Token.io Ltd](#)

Continue >

Need Help?

What is Lloyds Bank Secure Gateway? +

How do I log on? +

How will my details be protected? +

How does sharing work? +

How long will my account be shared? +

Confirm your identity

 None of your logon details will be shared.

Please enter your Online for Business password.

Password:

[Forgotten your logon details?](#)

[Cancel and go back to Token.io Ltd](#)

Continue 


Need Help?

What is Lloyds Bank Secure Gateway? 


How do I log on? 

How will my details be protected? 

How does sharing work? 

How long will my account be shared? 

Confirm your identity

 None of your logon details will be shared.

Please use your card reader and authentication card.

1. Enter the last 5 digits of your card number into the box below, ignoring any spaces.

Card number:

**** * [input box]

2. Insert your card into the card reader and press 'IDENTIFY'.

3. Key your PIN for this card into the card reader and press 'ENTER'.

4. Enter the 8-digit passcode shown by your card reader into the box below.



Need Help?

What is Lloyds Bank Secure Gateway? +

How do I log on? +

How will my details be protected? +

How does data sharing work? +


When will data sharing stop? +

Choose the accounts you'd like to share with Token.io Ltd:

Business Extra [REDACTED]

What am I sharing? 


You're sharing your data until you choose to stop sharing it.

 Remember, you can manage your data sharing through Online for Business and Token.io Ltd.
When you log on to Online for Business, look for the link under 'Admin'.

[Cancel and go back to Token.io Ltd](#)


[Continue >](#)

Need Help?

[Why can't I see all my accounts?](#) 

[What is Lloyds Bank Secure Gateway?](#) 

[How are my logon details used?](#) 

[How will my details be protected?](#) 

[How does sharing work?](#) 

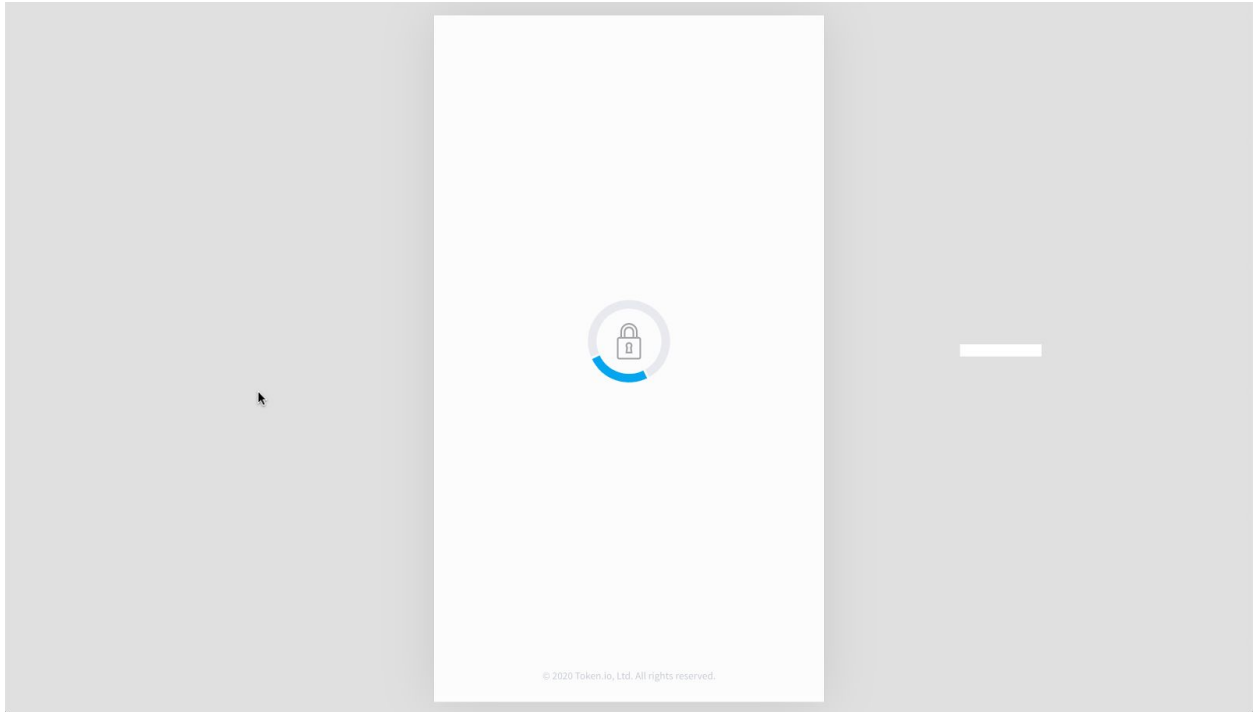
[How long will my account be shared?](#) 

Sharing now set up



We'll log you off and hand you back to Token.io Ltd.

Token.io Ltd will do the rest.







Transaction start date

We will pull transactions for the past 90 days. Or you can select a different date to pull transactions from. Some bank limitations may apply.

Transaction start date

Past 12 months  *

Back

Next



Connecting to your bank



This could take a few minutes

Next




Connecting to your bank



Connection successful

Next

LLOYDS BANK  **BUSINESS FINANCE ASSISTANT** Search Help & Feedback Your Profile

Home **Incomings** **Quotes** **Invoices** **Customers** **Products and Services** **Outgoings** **Expenses** **Suppliers** **VAT Return** **Bank Transactions** **Reports**

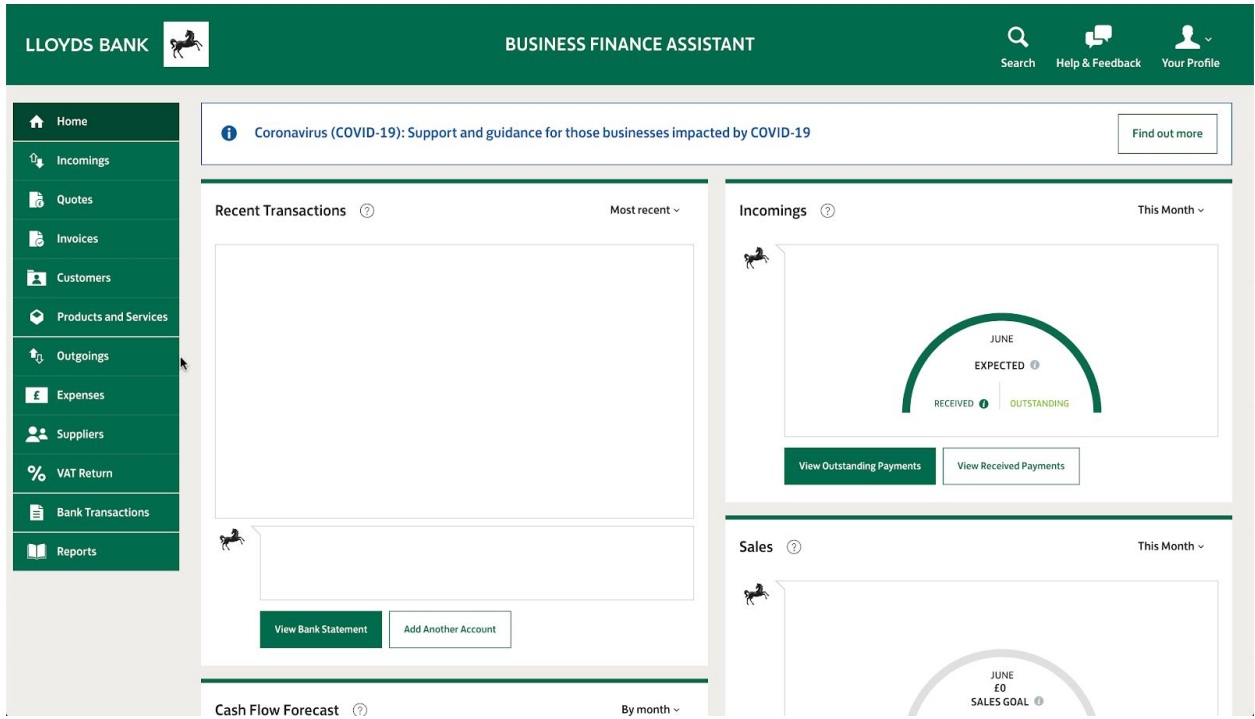
Coronavirus (COVID-19): Support and guidance for those businesses impacted by COVID-19 Find out more

Recent Transactions ? Most recent ▼

Incomings ? This Month ▼

Sales ? This Month ▼

Cash Flow Forecast ? By month ▼



The dashboard features a green navigation bar at the top with the Lloyds Bank logo and the text 'BUSINESS FINANCE ASSISTANT'. On the right side of the bar are links for 'Search', 'Help & Feedback', and 'Your Profile'. Below the bar is a left-hand navigation menu with icons and labels for 'Home', 'Incomings', 'Quotes', 'Invoices', 'Customers', 'Products and Services', 'Outgoings', 'Expenses', 'Suppliers', 'VAT Return', 'Bank Transactions', and 'Reports'. The main content area is divided into several sections. At the top, there is a notification banner for 'Coronavirus (COVID-19): Support and guidance for those businesses impacted by COVID-19' with a 'Find out more' button. Below this are three main panels: 'Recent Transactions' (with a 'Most recent' dropdown), 'Incomings' (with a 'This Month' dropdown), and 'Sales' (with a 'This Month' dropdown). Each of these panels contains a large empty box, likely for data visualization. The 'Incomings' panel includes a semi-circular gauge chart for 'JUNE EXPECTED' with 'RECEIVED' and 'OUTSTANDING' segments, and two buttons: 'View Outstanding Payments' and 'View Received Payments'. The 'Sales' panel includes a similar gauge chart for 'JUNE £0 SALES GOAL'. At the bottom, there is a 'Cash Flow Forecast' section with a 'By month' dropdown. A 'View Bank Statement' button and an 'Add Another Account' button are located at the bottom left of the main content area.