

This Set Up & Data Processing Guide is supplementary to the General Terms and Product Terms and is intended to be used as guidance for use and set up of the Service. Any definition not provided in this guide shall have the same meaning as set out elsewhere in the Agreement.

1. DEFINITIONS

1.1. The following definitions apply to this guide, in addition to those contained elsewhere in the Agreement:

“Data Append” means use of the Service to update and or append Supplier Data to the Input Files;

“HealthCheck” means use of the Service to generate a statistical report detailing the current quality of the Input Files. This can be delivered as a standalone element of the Service or in conjunction with a Data Append;

2. DATA TRANSFER TO THE SERVICE

2.1. The Customer agrees to only send Input Files to GBG via SFTP.

2.2. The Customer shall notify GBG of the name and contact details of the individual(s) who will be granted access to the SFTP in order to upload Input Files to the Service.

2.3. Log-in details will be provided to that individual by email and the password will be sent separately via phone or text.

2.4. No access to the SFTP will be granted before an Order Form has been fully executed by both Parties.

3. INPUT FILE

3.1. While GBG can accept a wide range of file formats, it is recommended that Customer’s supply their Input Files as follows:

(a) In a standard flat text file such as CSV with quotes, PSV with quotes, tab delimited etc.;

(b) With Header rows to help confirm the data variables being supplied;

(c) With variables that are decoded. For example, if “Title” is stored as a 1, 2 or 3, then GBG should be provided with the corresponding description, e.g. Mr, Mrs, Miss etc.; and

(d) As complete as possible, but GBG acknowledges use of the Service is often to complete such Input Files

4. DATA VARIABLES

4.1. Depending on the Dataset the following data variables should be included in the Input File in order to generate a Matched Record:

(a) For a full HealthCheck and or Data Append:

i. URN (optional but preferable)

ii. Name

iii. Address

iv. Postcode

v. Email address (optional but preferable)

vi. Mobile phone (optional but preferable)

vii. Landline phone (optional but preferable)

viii. Country Code (if appropriate)

ix. Cell code (if appropriate)

(b) For Email Validation as part of a HealthCheck or Data Append:

i. URN (optional but preferable)

ii. Email Address

(c) For Phone Validation as part of a HealthCheck or Data Append:

i. URN (optional but preferable)

ii. Mobile phone number

iii. Landline number

4.2. Name fields can be separated into title, forename and surname or concatenated into one single field, however only forename and surname are mandatory for a full HealthCheck or Data Append.

4.3. Address and postcode can be provided in one or multiple fields.

- 4.4. There can be more than one email or telephone number included.
- 4.5. Telephone country codes need to be provided, if the numbers supplied are from different countries.
- 4.6. Customers may send more fields than required, however GBG will only match against those listed above. The Customer should only provide relevant data in line with the data minimisation principle set out in the Applicable Data Protection Laws.
- 4.7. Any other identifier that the Customer may require, e.g. prospect verses active customer grouping, must be communicated to GBG and the Input File must contain a cell code identifying the applicable categorisation or separate Input Files must be sent.

5. MATCHING

- 5.1. As standard GBG uses the strictest Matching Rule available for each Dataset. The Standard Matching Rules and Default Matching Rules are set out in the Additional Terms and will always be applied to any processing carried out by GBG unless otherwise agreed.
- 5.2. The Matching Rules that may apply to a Dataset may include one or more of the following:
 - (a) Title/Gender matching
 - Titles will be converted to a male/female gender where possible.
 - Where a gender is not identified or supplied this rule will be ignored.
 - (b) Forename
 - Allows controlled tolerance.
 - Does not allow short names or first initials to match.
 - (c) Middle Initial
 - Where a middle initial is not present on input or the matching source, this will be ignored.
 - (d) Surname
 - Allows 1 letter difference or 1-character transposition.
 - (e) Address
 - Will use common derived matching elements such as building number, street name etc.
 - (f) Phone Number
 - (g) Email Address
- 5.3. GBG acknowledges that there may be instances where a Customer requires a wider tolerance of Matching Rules than the Default Matching Rule which GBG has set. Where Variable Matching Rules are available for a Dataset, a Customer may request that GBG applies a Variable Matching Rule by providing GBG with written notice setting out its justification for deviating from the Default Matching Rule. GBG reserves the right, as data controller of the Supplier Data and Input Files, to refuse to use Variable Matching Rules.

6. RESULTS

- 6.1. When a HealthCheck is requested, GBG shall process the Input Files against all Datasets available and shall return to the Customer a statistical report.
- 6.2. When a Data Append is requested, GBG shall return the Input File with additional fields and appended data. The Customer may request Results to be provided in an alternative format. In such instances the Customer must notify GBG and confirm its request in writing.
- 6.3. Codes will be used to indicate the meaning of such appended data and the documentation required to interpret the codes will be provided to the Customer as part of the Results.

7. DATA RETENTION

- 7.1. Customer Data and any copies of Input Files will be automatically deleted approximately 90 days following processing. The Customer can choose to have the Customer Data and or copies of Input Files deleted as soon as processing is completed, and a data destruction certificate can be provided.
- 7.2. If Customer Data is required to be reprocessed for any reason following deletion by GBG, the Customer will have to resubmit the Input Files for processing.
- 7.3. Notwithstanding the above, GBG retains the GBG Audit Trail for all processing carried out via the Service to ensure we can respond to data subject rights. GBG retain the GBG Audit Trail for a period of 12 months.