



# Sagacity

We're not just a data company

## Sagacity

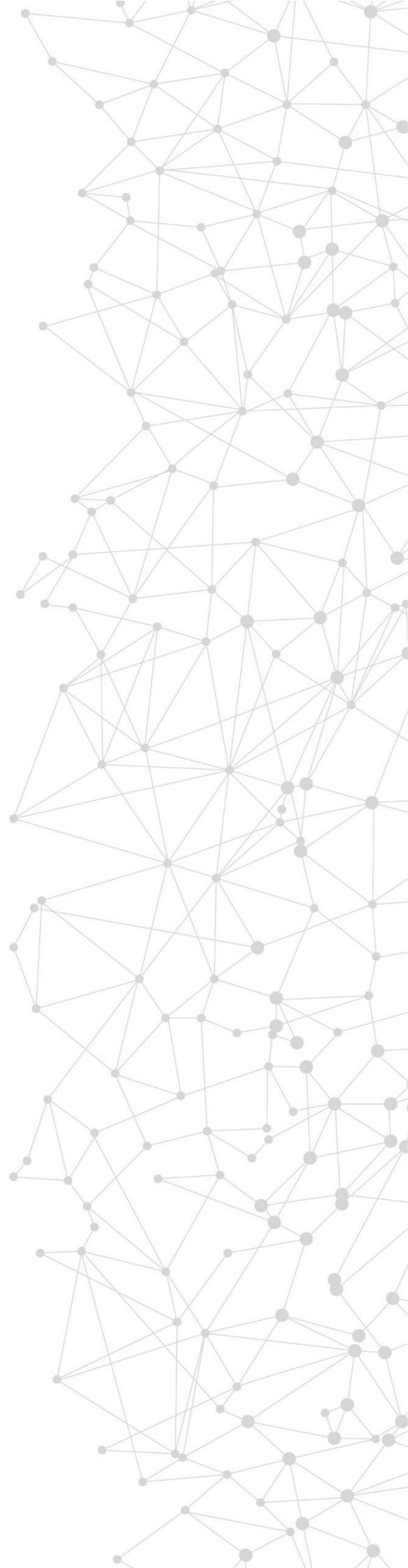
### Online User Guide

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V3.0



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## Introduction

Welcome to the Online User Guide. This guide is designed to provide users of Online with a reference document to help them:

- Set up an Account/Registration
- Accept the Online platform licence
- Accept the necessary End User Licences for the available products and services
- Create and run a clean job – QuickStart or New
- How to create a Quick Start job
- Results
- Purchasing

Through Online you can:

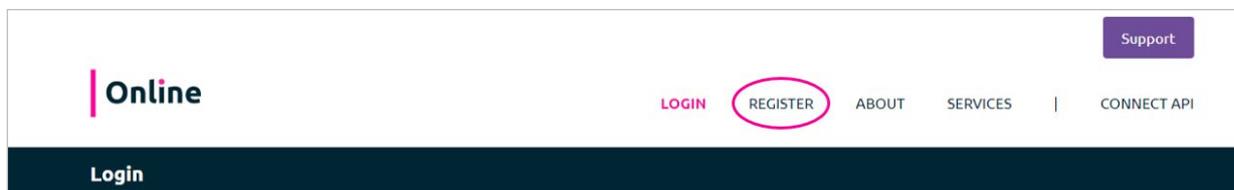
- Access the most comprehensive and accurate data products available in the UK
- Identify and deal with duplicate records on your customer and prospect database
- Improve the accuracy of address data to improve deliverability, response, and ROI
- Avoid causing bereaved friends and families distress by identifying and removing the details of those who have passed away
- Identify people who have moved to a new house and obtain forwarding addresses for some of your lost customers
- Add listed telephone numbers from the BT database to your customer and prospect records
- Stay and avoid potentially heavy fines by checking data against the TPS and MPS preference files
- Add more detail, such as age, gender, and wealth indicators to the information you already hold on your customers and prospects

Our aim is to help you gain maximum commercial advantage from the data you hold.

## Setting up an Account on Online

Go to <https://online.sagacitydata.co.uk/>

Click on Register in the top right of the homepage



Complete the **Account** set up form

 A screenshot of the registration form titled 'Register - Please complete the form below'. The form is organized into four main sections, each with a pink header line:
 

- About You:** Includes input fields for 'Forename', 'Surname', and 'Telephone Number', each with a placeholder text.
- Your Company:** Includes input fields for 'Company Name', 'Company Postcode', and 'Company Address', and a dropdown menu for 'Company Industry'.
- Your Credentials:** Includes input fields for 'Email Address', 'Confirm Email', 'Password', and 'Confirm Password', each with a placeholder text.
- Additional Contact Preferences:** Includes a paragraph of text and three checkboxes for 'By Email', 'By Post', and 'By Telephone'.

 Below the form, there is a pink 'REGISTER' button. At the bottom of the page, there is a decorative graphic of a network of blue nodes and lines.

Please note that your email address will be your login. It is recommended that you create a strong password including upper and lower case letters, numbers and symbols. Click Register to submit the form. You will receive a confirmation email to the email address you have provided.

**Not received the confirmation email? Please check your Junk folder – you may need to add @sagacitysolutions.co.uk to your safe sender list to ensure you receive notifications, job reports and service updates from the platform.**

### Credit Card Account or Credit Account

Please note when you register on the platform, your account will default to a credit card account so you can pay-as-you-go.

If you would like to open a Credit Account so you can pay on invoice and have access to Account Management support, please contact your Sagacity contact (if you have one) or please contact us for help at [enquiries@sagacitysolutions.co.uk](mailto:enquiries@sagacitysolutions.co.uk)

## Login to your account

When you have received the confirmation email, you can return to the homepage at - <https://online.sagacitydata.co.uk/>

### Select Login

Support

Online

LOGIN REGISTER ABOUT SERVICES | CONNECT API

### Login

Enter your user name below and click the 'Continue' button to continue.

Username

CONTINUE

Welcome to Online, our data management platform, the best way to clean, suppress or buy your data efficiently, reliably and confidently. We utilise the UK's most accurate data view and combine this with proprietary technology to provide you with the tools to optimise the accuracy, value and compliance of your data.

**Please use the support button at the top of the page for further assistance.**

**Information**

As part of an internal reorganisation, from the 1st January 2024 Online will be owned and operated by Sagacity Solutions Limited (Company number: 05526751) (Registered Office 120 Holborn).

Input your email address into the username field and click continue.

Support

Online

LOGIN REGISTER ABOUT SERVICES | CONNECT API

### Login

Enter your password in the form below and click the 'Login' button to continue.

Username test@sagacity.com

Password

BACK LOGIN

[I've forgotten my password!](#)

Welcome to Online, our data management platform, the best way to clean, suppress or buy your data efficiently, reliably and confidently. We utilise the UK's most accurate data view and combine this with proprietary technology to provide you with the tools to optimise the accuracy, value and compliance of your data.

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Then enter your chosen password and login. You can also reset your password from this screen by clicking the “I’ve forgotten my password” link.

## Platform License

When you first login, you will be presented with the End User License (EUL) for the platform. Please review and accept.

**Online**

### Terms of Business Agreement

Please accept the Terms of Business licence.  
To accept the Terms of Business please use the Accept button below.

Terms of Business - End User

This Agreement is made on the Start Date

Parties

(1) **Sagacity Data Limited (Registered No. 2959244)**, whose registered office is at The Pavilion, 1 Newhams Row, Bermondsey Street, London SE1 3UZ ('Sagacity'); and

(2) Sagacity Data, (**Registered No.**), whose registered office is situated at 1 Newhams Row London ('End User').

Recital

**ACCEPT**

## Product User Licenses

You will also be presented with the terms for the use of the data products within the platform. Please review and accept the User Licenses. These can be accessed at any time in the **Account – Licenses** area.

The screenshot shows the 'Licences' page within the 'Account Details' section. The top navigation bar includes 'Change Password', 'Support', and 'Log out'. Below this, there are buttons for 'CLEAN', 'SUPPLY', and 'ACCOUNT' (highlighted with callout 1). The 'Account Details' section includes links for 'Costs', 'User Management', 'File Transfer', 'Extras', and 'Licences' (highlighted with callout 2). A notification states 'Your subscription expires on: 15/10/2024'. The main content area is titled 'Licence Agreements' and contains a table with the following data:

Licence	Effective From	Expires	Status
Sagacity Data Terms of Business	28/04/2023		✓ Accepted
Address Processing	10/10/2023		✓ Accepted
Age Append	12/10/2023		✓ Accepted
Business Plus Business Select			✗ Available
Confidentiality and Data Processing Agreement			✗ Available
Email Append			✗ Available
Extra Numbers			✗ Available
Gone Away Suppression	11/10/2023		✓ Accepted
GAS Reactive			✗ Available
Geographic Flag			✗ Available
Information Works	11/10/2023		✓ Accepted
Lifesketch			✗ Available

At the bottom right of the table, there is a pagination control showing '1 - 12 / 23 rows' and navigation icons.

## Running a Clean Job

Select the **Clean** tab to take you to the **Data Cleaning Manager** page.

The screenshot shows the 'Online' interface for Sagacity. At the top right, there are buttons for 'Change Password', 'Support', and 'Log out'. Below these are navigation links for 'CLEAN', 'SUPPLY', and 'ACCOUNT'. A dark blue header bar contains 'Clean Services', 'Home', 'New Job' (with a dropdown arrow), and 'Dom Seller | Test'. The main content area features a large pink 'Welcome!' heading, followed by a message: 'It looks like this may be your first time with us or you haven't previously run a job through our platform. Please click on one of the links below to start your data cleaning journey.' Two large buttons are presented: a blue 'SIMPLIFIED MODE' button and a purple 'CUSTOM MODE' button. Below the 'SIMPLIFIED MODE' button is the text: 'Set up your daily cleaning job in less than 5 minutes! Perfect for those who want to spend less time and effort creating their jobs.' Below the 'CUSTOM MODE' button is the text: 'Take full control over your job. Designed for users who need to set more complex configurations for their data cleaning.' At the bottom left is the Sagacity logo, and at the bottom right are links for 'Terms & Conditions | Privacy | Sagacity'.

You will be met with this page if your account hasn't run any jobs previously, allowing you to start the job process by following one of the two links.

You will be presented with a "Simplified Mode" and a "Custom Mode". Simplified Mode allows you to choose from certain templates with pre-set outputs, allowing you to process a data cleaning job in under five minutes. Perfect for those who want to spend less time creating their jobs.

Custom Mode allows you to take full control over the set up of the job, including choosing the specific services required, their respective settings and desired output formats.

Job	Status	Last Run	Options
Core Cleanse test	✓ Complete	18/10/2023 13:19	⚙️ ↻ 📄 🔄 🗑️
Custom Mode Test	✓ Complete	12/10/2023 11:42	⚙️ ↻ 📄 🗑️
Core Cleanse	✓ Complete	11/10/2023 16:22	⚙️ ↻ 📄 🗑️
TPS & Deceased	✓ Complete	11/10/2023 15:56	⚙️ ↻ 📄 🗑️
test	✓ Complete	11/10/2023 15:56	⚙️ ↻ 📄 🗑️
asdasdasd	✓ Complete	10/10/2023 15:31	⚙️ ↻ 📄 🗑️
asdad	✓ Ready	Never	⚙️ ▶️ 📄 🗑️
TPS & Deceased	✓ Ready	Never	⚙️ ▶️ 📄 🗑️
TPS & Deceased	✓ Ready	Never	⚙️ ▶️ 📄 🗑️
TPS & Deceased	✓ Ready	Never	⚙️ ▶️ 📄 🗑️

If you have previously run a job before, you will be met with this page listing those jobs and their details. You can then start a new job by clicking the “New Job” page title at the top and selecting which mode you would like to create your job in.

Job	Status	Last Run	Options
Core Cleanse test	✓ Complete	18/10/2023 13:19	⚙️ ↻ 📄 🔄 🗑️
Custom Mode Test	✓ Complete	12/10/2023 11:42	⚙️ ↻ 📄 🗑️

You are also able to interact with previously run jobs by clicking on the option icons to the right hand side of the table.

Job	Status	Last Run 	Options
Core Cleanse test 	✔ Complete	18/10/2023 17:05	     
Custom Mode Test 	✔ Complete	12/10/2023 11:42	     
Core Cleanse 	✔ Complete	11/10/2023 16:22	     
TPS & Deceased 	✔ Complete	11/10/2023 15:56	     
test 	✔ Complete	11/10/2023 15:56	     
asdasdasd 	✔ Complete	10/10/2023 15:31	     



- Rename the job



- Review the settings used for a job



- Rerun the same job again



- Save the job as a template to be used in Simplified Mode



- Copy the job and run it as new



- Purchase the job



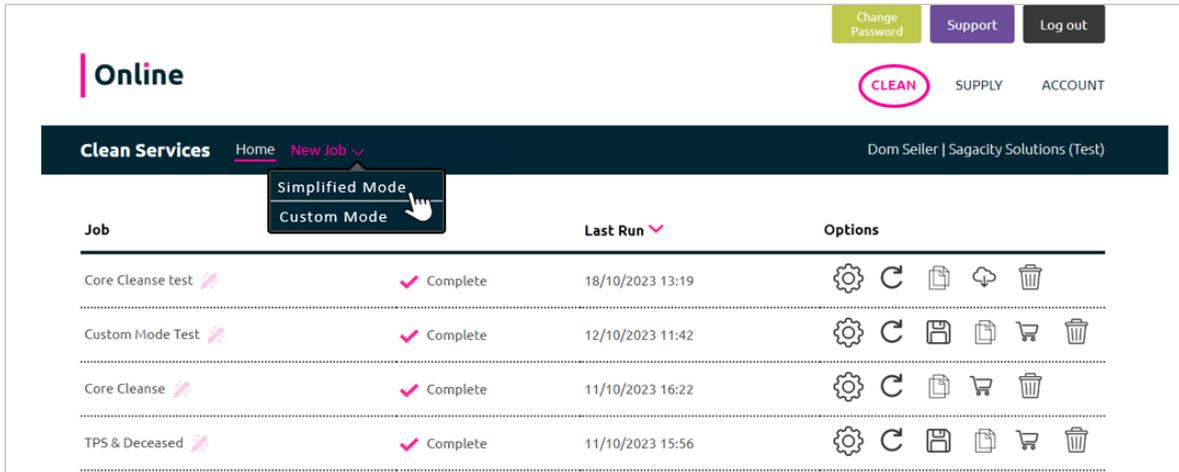
- Collect the job's results



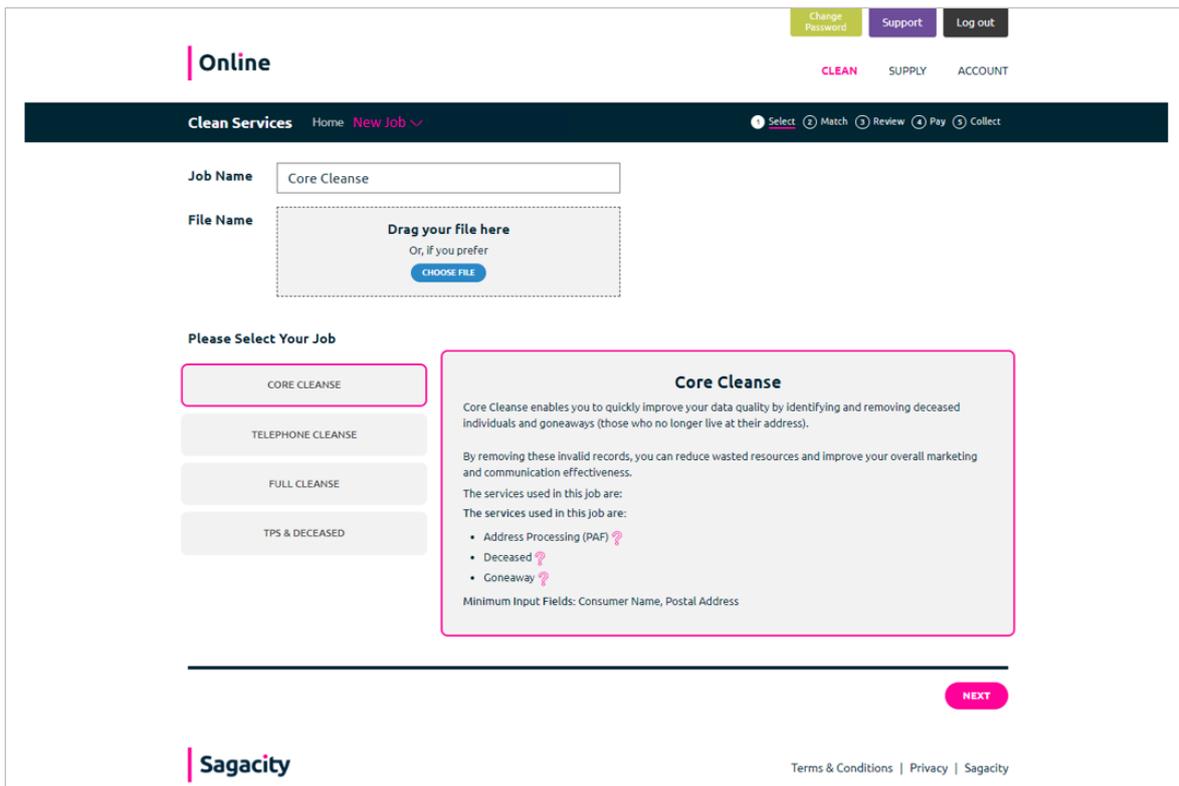
- Delete the job

# Start a New Job: Simplified Mode

Stage 1: Select “New Job” at the top and then select “simplified mode”



This will take you to step 1 of the Simplified Mode journey. From here, select the pre-set template you want to use, upload your file, and rename your job if you want.



You can change which templates are enabled by going to the account tab and then “manage templates”.

Template Name	Status	Actions
Core Cleanse	Enabled	✕
Telephone Cleanse	Enabled	✕
Full Cleanse	Enabled	✕
TPS & Deceased	Enabled	✎ ⚙️ ✕ 🗑️
Basic Database Quality	Disabled	▶
Mailing Campaign	Disabled	▶
Telephone Campaign	Disabled	▶
Deceased & Goneaway	Disabled	▶
Comprehensive Clean	Disabled	▶

Once you've selected the job you want to run and uploaded your file, you can move to the next step, the matching stage.

## Stage 2: Matching

**Match your fields to ours**

To make sure we correctly identify what type of data your have uploaded, please match your fields shown below with our available fields. Just drag and drop the correct field to the right row.

No.	Your Data	Our Fields
1	FIRST NAME DOM	Forename / Initial
2	SURNAME SEILER	Surname
3	EMAIL DOMINIC@THESEILERS.CO.UK	Email Address
4	POSTCODE AL2 3SN	Full Postcode
5	ADDRESS LINE 1 40 LARCH AVENUE	Address 1
6	PHONE NUMBER 07590711764	Tel/Fax Whole Number 1
7		
8		
9		

**Available Fields**

- Title
- Forename / Initial
- Surname
- Full name
- Company Name
- Company/Full Name
- House Name/number
- Address 1
- Address 2
- Address 3
- Address 4
- Address 5
- Address 6

From this page, you can match up the columns from your data to our own field titles, making sure we correctly recognise which data is which within your file. This can be done by dragging and dropping the available fields on the right-hand side to the corresponding field shown on the left-hand side of the table.

We will match up any fields we can recognise, but there may be some gaps! You can also change some of the input field settings by clicking on the gear icon at the top of the available fields.

**Options**

**Input File Options**

**Input Fields**

**Input File Options**

Headers & Footers

- Skip Header
- Skip Footer
- Add header record to output file

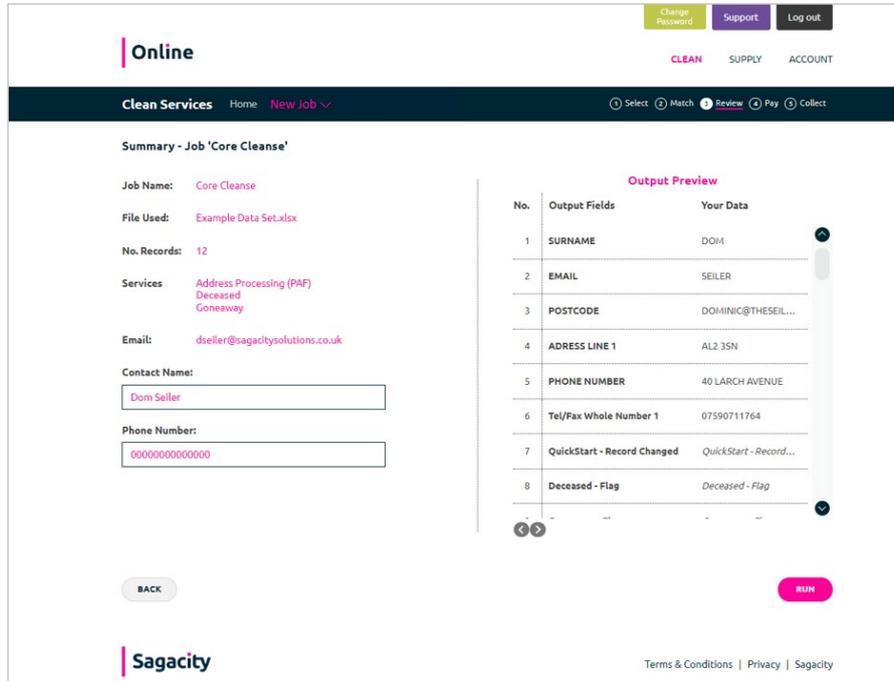
**Select database to process**

Please Select

- Reset output fields to default settings
- Set unassigned input fields to be user fields

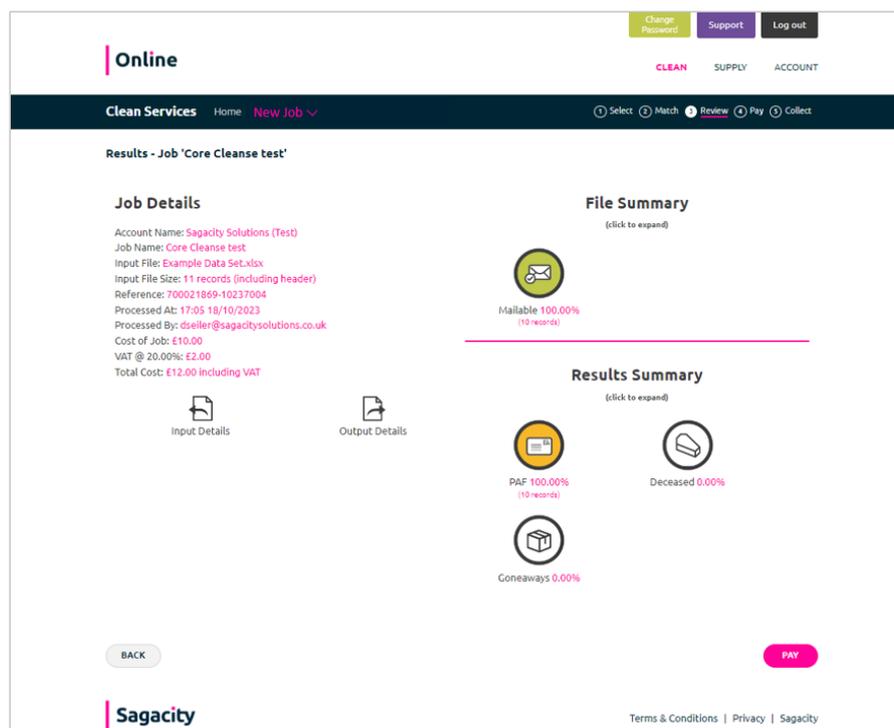
Once you made sure all fields are correctly matched up, you can move to the next step, the review stage.

### Stage 3: Review



From here, you can see an example of what your output will look like and the details of the job you're about to run. If you're happy with them all, you can then run the job.

Once the job is run, you will then be able to see the results.



From here, you can see the overall results of the job you've run, click on each icon to find out the specifics for that service, such as the match rate and how many records were flagged. You can then move onto the Payment step.

## Stage 4: Pay

The screenshot displays the 'Stage 4: Pay' interface. At the top, there are navigation links for 'Change Password', 'Support', and 'Log out'. The main header includes 'Online' and 'Clean Services' with a 'New Job' dropdown. A progress bar shows steps: 1 Select, 2 Match, 3 Review, 4 Pay (current), 5 Collect.

**All required licences have been accepted**

Licence Name	Status	View Licence
Address Processing	✓ Accepted	
National Change Of Address [Suppress]	✓ Accepted	
Mailing Preference Service	✓ Not Required	
The Bereavement Register	✓ Accepted	
Mortascreen	✓ Accepted	
Gone Away Suppression	✓ Accepted	

1 - 6 / 7 rows

**Job Details**

Account Name: Sagacity Solutions (Test)  
 Job Name: Core Cleanse test  
 Processed By: dseller@sagacitysolutions.co.uk  
 Cost of Job: £10.00  
 VAT @ %20: £2.00  
 Total Cost: £12.00

**Pay for Results**

Pay by account  
 Pay by credit card

Cost of Job (Inc. VAT): £12.00  
 Please note that this job is subject to a £10.00 minimum charge.

**PayPal**

**Debit or Credit Card**

Powered by PayPal

BACK NEXT

From here, you can review all the licences needed to complete the job by clicking on the magnifying glass on the right and accept any you haven't accepted yet. This can be done in bulk by pressing the "accept all" button shown at the bottom of the table.

Once the required licences have been accepted, you can then choose your payment method below. For credit card accounts, you can use PayPal or a direct card transaction. Credit users will be able to charge it to their account and pay by invoice.

### Once Purchased

**\*The first time a customer downloads their results you will need to define a pin code. This pin will be required to download results in the future\***



## Create Security Code

✎ ?

A security code is required to access your results, however a security code has yet to be created.

Please enter a 6 digit security code to be used, then click 'Next' to continue.

1	2	3
4	5	6
7	8	9
Del	0	Clr

1st

2nd

3rd

4th

5th

6th

HOME
BACK
NEXT

**If a pin code has been defined previously, Online will prompt for three random digits. The Reset Code button can be used to request a reset link if the pin code cannot be remembered.**

UK CONSUMER FILE - MAILABLE DATA ONLY

✎ ?

## Confirm Security Code

Please confirm the specified digits of your security code by clicking the buttons on the supplied keypad.

Once supplied, click 'Next' to continue

1	2	3
4	5	6
7	8	9
Del	0	Clr

3rd

4th

6th

**Forgotten your Security Code?**

RESET CODE

HOME
BACK
NEXT

## Stage 5: Results

Online

Change Password
Support
Log out

CLEAN
SUPPLY
ACCOUNT

Clean Services
Home
New Job ▾

1 Select
2 Match
3 Review
4 Pay
5 Collect

### Collect Results - Job 'Core Cleanse test'

File Name	Description	Size	
MAILABLE.exe	Output file containing Ready to mail file	190.14 KB	
MAILABLE.ZIP	Zipped Ready to mail file	7.71 KB	
MAILABLX.exe	<b>NEW</b> Output file containing Ready to mail file excluding unconfirmed PAF addresses (contains header record)	190.25 KB	
MAILABLX.ZIP	<b>NEW</b> Zipped Ready to mail file excluding unconfirmed PAF addresses (contains header record)	7.81 KB	
RESULTS.exe	Output file	190.35 KB	
RESULTS.ZIP	Zipped Output file	7.92 KB	

#### Job Details

Account Name: **Sagacity Solutions (Test)**  
 Job Name: **Core Cleanse test**  
 Input File: **Example Data Set.xlsx**  
 Input File Size: **11 records (including header)**  
 Reference: **700021869-10237004**  
 Processed At: **17:05 18/10/2023**  
 Purchased: **17:44 18/10/2023**  
 Processed By: **dseller@sagacitysolutions.co.uk**  
 Cost of Job: **£10.00**  
 VAT @ 20.00%: **£2.00**  
 Total Cost: **£12.00 including VAT**

Input Details

Output Details

You can now download your results in a choice of formats by clicking on the corresponding icon in the correct row of the table.

# Start a New job: Custom Mode

Select “New Job” at the top and then select “custom mode”

**Online**

Change Password | Support | Log out

CLEAN | SUPPLY | ACCOUNT

Clean Services | Home | **New Job** | 1 Select | 2 Match | 3 Output | 4 Review | 5 Pay | 6 Collect

**Enter Job Name and Select Input** COPY JOB ?

Please enter your job name and provide an input file, either by dragging and dropping onto the box provided or by clicking the link.

**Job Name**

**File Name** Drag your file here  
Or, if you prefer CHOOSE FILE

**Select your Services**  
Please select as many required services below as you need, by clicking on the relevant boxes.  
(click on the question mark in the top right for more help)

Address Screening	Suppression	Telephone Numbers	Enhancement
Address Processing (PAF) <span>?</span>	MPS <span>?</span>	Consumer Telemumbering <span>?</span>	Mosaic Profile <span>?</span> <span>?</span>
GAS Reactive <span>?</span>	Baby MPS <span>?</span>	Business Telemumbering <span>?</span>	Mosaic <span>?</span> <span>?</span>
<b>Absolute Contacts</b> <span>?</span> <span>?</span>	Goneaway <span>?</span>	<b>Mobile Telemumbering</b> <span>?</span> <span>?</span>	Age Append <span>?</span>
NCOA Update <span>?</span>		Extra Names <span>?</span>	Lifesketch <span>?</span>
Deduplication <span>?</span>		Mapper <span>?</span>	Geographic Flag <span>?</span>
UK Consumer Verification <span>?</span>		TPS <span>?</span>	The Affluence Profile <span>?</span>
		TPS+ <span>?</span>	Wealth Tagging <span>?</span>
		Corporate TPS <span>?</span>	Business Plus <span>?</span>
		Corporate TPS+ <span>?</span>	Name Formatting <span>?</span>
		FPS <span>?</span>	Email Validation <span>?</span>
		SureCall <span>?</span>	<b>Email Append</b> <span>?</span> <span>?</span>
			Profanity Check <span>?</span>

HOME NEXT

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Then select the ‘Services’ you wish to run from the four service types:

- Address Screening
- Mail Suppression
- Telephone Numbers
- Data Collating

Details and definitions of the service files can be accessed by clicking on the titles or hovering over the service name. You can customise the settings by clicking on the gear icon on the right-hand side of the box which appears once the service is selected.

The screenshot shows a 'Choose your options' dialog box. At the top, there are two service cards: 'Address Processing (PAF)' and 'GAS Reactive'. The 'GAS Reactive' card is highlighted with a red border and contains an information icon and a gear icon. Below this is the 'Choose your options' dialog box. It has a title bar with a gear icon, the text 'Choose your options', and close and help icons. The main content area is titled 'Goneaway Options' and has three tabs: 'File Type', 'Services', and 'Options'. The 'Services' tab is active, showing a list of services to select: 'GAS', 'Information Works Goneaway', and 'NCOA Suppress'. Below the list is a 'Service Notice' section with a 'Purity' notice: 'Please note that due to Acxiom retiring this product it is no longer available in Online. Existing job templates that use Purity will continue to process normally, although no matches will be reported for this service.'

**Please note:** For the **Online** system to work, please upload the Name, Address and where applicable Telephone Numbers for the contacts within your database. The Name data you provide can be uploaded as a single field (Full Name) or split across multiple fields (Title, Forename, Surname). The Telephone Number field does not need to be populated for every record that you upload.

Click **Next** (in the bottom right corner) to move to the next stage.

## Stage 2: Match

**Online** | Change Password | Support | Log out

CLEAN SUPPLY ACCOUNT

Clean Services Home New Job

1 Select 2 Match 3 Output 4 Review 5 Pay 6 Collect

### Match your fields to ours

To make sure we correctly identify what type of data you have uploaded, please match your fields shown below with our available fields. Just drag and drop the correct field to the right row.

No.	Your Data	Our Fields	Available Fields
1	FIRST NAME DOM	Forename / Initial	Title
2	SURNAME SEILER	Surname	Forename / Initial
3	EMAIL DOMINIC@THESEILERS.CO.UK	Email Address	Surname
4	POSTCODE AL2 3SN	Full Postcode	Full name
5	ADDRESS LINE 1 40 LARCH AVENUE	Address 1	Company Name
6	PHONE NUMBER 07590711764	Tel/Fax Whole Number 1	Company/Full Name
7			House Name/number
			Address 1
			Address 2
			Address 3

During the data upload, **Online** will have identified what it believes to be the correct field layout within your file. At this stage you need to check that the system has correctly identified the relevant name, address and contact data fields within the file. If not, please drag and then drop the Fields to the corresponding Input Fields accordingly until this is correct.

The gear icon next to **'Available Fields'** allows you to set field usage, split files in output and input data formatting as well as some other features.

**Please Note:** The **'Support'** button in the top right-hand corner can help answer any queries throughout the process.

### Stage 3: Output

**Online** | Change Password | Support | Log out

CLEAN SUPPLY ACCOUNT

Clean Services Home Simplified Mode Custom Mode

1 Select 2 Match 3 Output 4 Review 5 Pay 6 Collect

#### Configure Output File

Review the layout of your output file and modify as needed. Just simply drag and drop the fields you want from the list on the right into the table. Remove fields by dragging them out of the table.

No.	Example Output	Output Fields
1	DOM	Forename / Initial 1
2	SEILER	Surname
3	DOMINIC@THESEILERS.CO.UK	Email Address
4	AL2 3SN	Full Postcode
5	40 LARCH AVENUE	Address 1
6	07590711764	Tel/Fax Whole Number 1
7	GAS Reactive - Flag	GAS Reactive - Flag
8	GAS Reactive - Address 1	GAS Reactive - Address 1
9	GAS Reactive - Address 2	GAS Reactive - Address 2
10	GAS Reactive - Address 3	GAS Reactive - Address 3

**Available Fields**

GAS Reactive

- GAS Reactive - Flag
- GAS Reactive - Name Matched
- GAS Reactive - New Occupier
- GAS Reactive - Address 1
- GAS Reactive - Address 2
- GAS Reactive - Address 3
- GAS Reactive - Address 4
- GAS Reactive - Address 5
- GAS Reactive - Address 6
- GAS Reactive - Town
- GAS Reactive - County
- GAS Reactive - Postcode
- GAS Reactive - DPS
- GAS Reactive - Match Level

At this stage, you need to define what output format you would like the returned data to take. Just like the previous step, drag and drop the available output fields into the table if you would like them added. If you do not want a field included in the output, drag it out.

No.	Example Output	Output Fields
9	GAS Reactive - Address 2	GAS Reactive - Address 2
10	GAS Reactive - Address 3	GAS Reactive - Address 3
11	GAS Reactive - Address 4	GAS Reactive - Address 4
12	GAS Reactive - Town	GAS Reactive - Town
13	GAS Reactive - Postcode	GAS Reactive - Postcode
14		Goneaway - Source
15		
16		

**Available Fields**

Goneaway

- Goneaway - Flag
- Goneaway - Source
- Goneaway - Match Level
- Goneaway - Name Matched

You can also amend some of the file options by clicking on the gear icon next to the “Available fields”.

## Stage 4: Review

On this page you simply need to review the details of your file and select 'Run'.

When your job is running you can leave the browser open and watch the progress or close and log-out to come back too. You will receive an email once your job has run.

The screenshot shows the 'Review' stage of a data cleansing job. The page is titled 'Online' and includes navigation links for 'Change Password', 'Support', and 'Log out'. The main navigation bar shows 'Clean Services' with 'Home' and 'New Job' options. A progress indicator at the top right shows steps: 1 Select, 2 Match, 3 Review (current), 4 Pay, 5 Collect.

**Summary - Job 'Core Cleanse'**

- Job Name: Core Cleanse
- File Used: Example Data Set.xlsx
- No. Records: 12
- Services: Address Processing (PAF), Deceased, Goneaway
- Email: dseiler@sagacitysolutions.co.uk
- Contact Name: Dom Seiler
- Phone Number: 0000000000000000

**Output Preview**

No.	Output Fields	Your Data
1	SURNAME	DOM
2	EMAIL	SEILER
3	POSTCODE	DOMINIC@THESEIL...
4	ADRESS LINE 1	AL2 35N
5	PHONE NUMBER	40 LARCH AVENUE
6	Tel/Fax Whole Number 1	07590711764
7	QuickStart - Record Changed	QuickStart - Record...
8	Deceased - Flag	Deceased - Flag

Buttons: BACK, RUN

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When your file has finished processing you will move through to a page that displays the results of your data cleansing job. You can download the report and/or receive it by email.

When the job is completed and the results file is built – you can view 'Results' in the tab. View overall results and details by service, including costs. At this stage there is no charge – audits are free.

Change Password Support Log out

**Online** CLEAN SUPPLY ACCOUNT

Clean Services Home New Job 1 Select 2 Match 3 Review 4 Pay 5 Collect

### Results - Job 'Core Cleanse test'

#### Job Details

Account Name: **Sagacity Solutions (Test)**  
Job Name: **Core Cleanse test**  
Input File: **Example Data Set.xlsx**  
Input File Size: **11 records (including header)**  
Reference: **700021869-10237004**  
Processed At: **17:05 18/10/2023**  
Processed By: **dseiler@sagacitysolutions.co.uk**  
Cost of Job: **£10.00**  
VAT @ 20.00%: **£2.00**  
Total Cost: **£12.00 including VAT**

 Input Details  Output Details

#### File Summary

(click to expand)

  
Available **100.00%**  
(10 records)

---

#### Results Summary

(click to expand)

  
PAF **100.00%**  
(10 records)

  
Deceased **0.00%**

  
Goneaways **0.00%**

BACK PAY

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## Stage 5: Purchasing

You have 7 days from the date of audit to buy and collect your data. When data is purchased, it will remain available for 35 days.

From here, you can review all the licences needed to complete the job by clicking on the magnifying glass on the right and accept any you haven't yet accepted. This can be done in bulk by pressing the "accept all" button shown at the bottom of the table.

Once the required licences have been accepted, you can then choose your payment method below. For credit card accounts, you can use PayPal or a direct card transaction. Credit users will be able to charge it to their account and pay by invoice.

The screenshot displays the 'Online' interface for a 'Clean Services' job. The top navigation bar includes 'Change Password', 'Support', and 'Log out' buttons. Below this, there are tabs for 'CLEAN', 'SUPPLY', and 'ACCOUNT'. The main header shows 'Clean Services' with 'Home' and 'New Job' options, and a progress indicator with steps: 1 Select, 2 Match, 3 Review, 4 Pay (active), 5 Collect.

A notification states: 'All required licences have been accepted'. Below this is a table of licences:

Licence Name	Status	View Licence
Address Processing	✓ Accepted	
National Change Of Address [Suppress]	✓ Accepted	
Mailing Preference Service	✓ Not Required	
The Bereavement Register	✓ Accepted	
Mortascreen	✓ Accepted	
Gone Away Suppression	✓ Accepted	

Below the table is a pagination control showing '1 - 6 / 7 rows' and navigation icons.

To the right of the table is the 'Job Details' section:

- Account Name: Sagacity Solutions (Test)
- Job Name: Core Cleanse test
- Processed By: dseller@sagacitysolutions.co.uk
- Cost of Job: £10.00
- VAT @ %20: £2.00
- Total Cost: £12.00

Below the table is the 'Pay for Results' section:

- Pay by account
- Pay by credit card
- Cost of Job (Inc. VAT): £12.00
- Please note that this job is subject to a £10.00 minimum charge.

Two payment method buttons are shown: a yellow 'PayPal' button and a dark grey 'Debit or Credit Card' button. Below these is the text 'Powered by PayPal'.

At the bottom of the page, there are 'BACK' and 'NEXT' buttons.

**Once Purchased**

**\*The first time a customer downloads their results you will need to define a pin code. This pin will be required to download results in future\***



### Create Security Code

?

A security code is required to access your results, however a security code has yet to be created.  
Please enter a 6 digit security code to be used, then click 'Next' to continue.

1	2	3
4	5	6
7	8	9
Del	0	Clr

1st

2nd

3rd

4th

5th

6th

HOME
BACK
NEXT

If a pin code has been defined previously, Online will prompt for three random digits. The Reset Code button can be used to request a reset link if the pin code can't be remembered.

UK CONSUMER FILE - MAILABLE DATA ONLY

?

### Confirm Security Code

Please confirm the specified digits of your security code by clicking the buttons on the supplied keypad.  
Once supplied, click 'Next' to continue

1	2	3
4	5	6
7	8	9
Del	0	Clr

3rd

4th

6th

Forgotten your Security Code?

RESET CODE

HOME
BACK
NEXT

**\*You must agree to the terms of use at this stage\***

i Options

### GDPR: Addendum to Terms of Business and End User Licence Terms

In order to ensure that both we and you comply with GDPR and in line with our current Terms of Business, the Terms for use of certain services are amended as detailed below, effective from 00:01 on 25<sup>th</sup> May 2018.

Service / Process	Usage Basis	Data Use-By Period	Conditions
<b>Business and Consumer Data Supply</b>			
Prospect data supply to End User-specified selections	Single campaign use only, unless otherwise confirmed.	90 days from supply date	End User must obtain consent for ongoing contact. Data to be deleted at end of Use-By Period if data subject has not consented to ongoing contact.

General Requirements (applicable to services above):

1. End User must have a valid legal basis for processing the data provided under this agreement and must have conducted any applicable Legitimate Interests Assessments (LIAs), with positive conclusions.
2. Exclusions: The data and services above must not be used in relation to ANY of the following campaigns or activities: adult industry, health-related, claims (PPI, personal injury, motor accident, etc).
3. Data may only be used within the stated Usage Basis and Data Use-By Period limits outlined above unless End User obtains consent from the data subject.
4. Sagacity to be acknowledged as the data source in the event of any queries or complaints relating to the above services
5. If advised that any data provided by Sagacity's services relating to a data subject is incorrect, End User must cease use immediately and promptly inform Sagacity.
6. If aware of any complaint from a data subject relating to the above services, End User must cease use and promptly inform Sagacity.
7. End User must comply with all applicable legislation and guidance from regulatory bodies relating to the use of data supplied by Sagacity, as amended from time to time.
8. Where data is supplied, or channel data is appended to client's existing data, End User must offer the data subject the chance to opt-out from further contact.
9. When supplied or appended data is used (where permitted) more than 28 days after delivery, it must be re-screened by Sagacity every 28 days (free service) so that fresh opt-outs can be suppressed.

I have read, understood and accept the above amendments to the Terms of Business applicable to these services.

Please click OK to accept the above and continue.

OK
CANCEL

Click on the version of the file that you wish to download. A windows dialogue box will appear providing the opportunity to **'Open'** the file, **'Save'** the file.

Download the different results files and apply the changes to your database. The results files will use the same field layout and text delimiters that were used for the input file you uploaded.

Please refer to the **Appendix** for further details for 'Understanding your results'.

## Stage 6: Results

Online

Change Password
Support
Log out

CLEAN
SUPPLY
ACCOUNT

Clean Services
Home
New Job ▼

1 Select 2 Match 3 Review 4 Pay 5 Collect

### Collect Results - Job 'Core Cleanse test'

File Name	Description	Size	
MAILABLE.exe	Output file containing Ready to mail file	190.14 KB	
MAILABLE.ZIP	Zipped Ready to mail file	7.71 KB	
MAILABLX.exe	NEW Output file containing Ready to mail file excluding unconfirmed PAF addresses (contains header record)	190.25 KB	
MAILABLX.ZIP	NEW Zipped Ready to mail file excluding unconfirmed PAF addresses (contains header record)	7.81 KB	
RESULTS.exe	Output file	190.35 KB	
RESULTS.ZIP	Zipped Output file	7.92 KB	

#### Job Details

Account Name: Sagacity Solutions (Test)  
 Job Name: Core Cleanse test  
 Input File: Example Data Set.xlsx  
 Input File Size: 11 records (including header)  
 Reference: 700021869-10237004  
 Processed At: 17:05 18/10/2023  
 Purchased: 17:44 18/10/2023  
 Processed By: dseiler@sagacitysolutions.co.uk  
 Cost of Job: £10.00  
 VAT @ 20.00%: £2.00  
 Total Cost: £12.00 including VAT

Input Details

Output Details

You can now download your results in whichever format you need by clicking on the corresponding icon in the correct row of the table.

## Running a Supply Job

Click on **Supply** to open the **Data Supply Manager**:

The screenshot shows the 'Data Supply Manager' interface. At the top right, there are 'Support' and 'Log out' buttons. Below the 'Online' header, there are 'CLEAN', 'SUPPLY', and 'ACCOUNT' tabs. The main header includes 'Data Supply Manager', the user name 'Jason Pulham', and 'Sagacity Solutions'. On the left, there is a sidebar with six icons: 'New' (document), 'Open' (folder), 'Import List' (play button), 'Delete' (trash can), 'Copy' (document with plus), and 'Rename' (pencil). The main area features a table with columns 'Job', 'Status', 'Last Run', and 'Options'. Below the table, there is a pagination control showing '1 of 1 job page' and navigation arrows, along with 'CLEAR' and 'SEARCH' buttons. The 'Sagacity' logo is at the bottom left, and 'Terms & Conditions | Privacy | Sagacity' is at the bottom right.

### Supply Dashboard Explained:

**New** = start a new job

**Open** = Open an existing job (won't return any results if you have not run a job previously)

**Import List** = use this function to import a list for exclusion purpose if required

**Delete** = delete a selected

**Copy** = copy a selected job

**Rename** = rename an existing job

Select **New** to get started.

**Stage 1:** Select the type of data you want

The screenshot shows the 'Data Supply Wizard' interface. At the top right, there are 'Support' and 'Log out' buttons. Below them are 'CLEAN', 'SUPPLY', and 'ACCOUNT' options. A progress bar at the top indicates the current stage: 'Stage' with steps 1 (Source), 2 (Areas), 3 (Profile), 4 (Output), 5 (Run), 6 (Pay), and 7 (Collect). The main heading is 'Data Supply Wizard' with a subtitle 'Select the type of data to be supplied'. Below this is a 'List Name:' field with an edit icon. The 'Select Data Source' section contains two radio button options: 'Business Select' and 'UK Consumer File'. At the bottom, there are 'HOME' and 'NEXT' buttons. The Sagacity logo and 'Terms & Conditions | Privacy | Sagacity' are at the bottom right.

Choose your selections and add a name for your List job

The screenshot shows the 'Data Supply Wizard' interface at a later stage. The progress bar now shows steps 1 through 7, with step 7 (Collect) highlighted. The 'List Name:' field now contains the text 'Test Supply Job 06-03' with an edit icon. The 'Select Data Source' section has three radio button options: 'Business Select', 'UK Consumer File' (which is selected), and 'All Data Including Non-Mailable'. Under 'UK Consumer File', there is a sub-option 'Mailable Data ONLY' which is also selected. The 'Options' section has a heading 'Do you require telephone numbers?' with two radio button options: 'Yes' and 'No' (which is selected). 'HOME' and 'NEXT' buttons are at the bottom. The Sagacity logo and 'Terms & Conditions | Privacy | Sagacity' are at the bottom right.

## Stage 2: Select the Geographical Area you require

Support Log out

CLEAN SUPPLY ACCOUNT

Online

Stage Source 1 Areas 2 Profile 3 Output 4 Run 5 Pay 6 Collect 7

UK CONSUMER FILE - MAILABLE DATA ONLY

### Data Supply Wizard

#### Geographical Area

Please select the geographical areas for your list.

SELECT IMPORT

Category  
Please Select

Area  
Please Select

SEARCH ADD

INCLUDE EXCLUDE DEDUPE

Selected Area	Available
Total Records	0

ALL CLEAR



HOME BACK NEXT

Sagacity

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**Stage 3:** Refine your selections using the categories available, then click Next

Stage
Source 1
Areas 2
Profile 3
Output 4
Run 5
Pay 6
Collect 7

UK CONSUMER FILE - MAILABLE DATA ONLY

## Data Supply Wizard

**Data Profile**

Optionally specify a profile for your geographical areas

**Distribution**

Spread records evenly

Selected Area	Selected	Available
ENGLAND	All	9442911
<b>Total Records</b>	<b>9,442,911</b>	<b>9,442,911</b>

ALL
EDIT
CLEAR

GLOBAL

CHARITIES

HOBBIES

GENERAL

---

**General**

**Hobby**

Antiques / Fine Arts

Birds

Business Current Affairs

Cars / Transport

Cinema

Computers / Internet

Cooking

Crosswords / Puzzles

Culture

Current Affairs

Cycling

DIY

Eating Out

Education

Entertainment

Fashion

Film / Theatre

Fishing

Food / Drink

Football

Foreign Travel

Further Education

Gardening

Golf

Grand Children

Gym

Health / Fitness

Health Food

Holiday / Travel

Home / Family

Home / Garden

Home / Interior Design

Motors

Music

Nature

News / Media

Organic Food

Pets

Photography

Pubs

Quiz

Reading

Running

Shopping

Skiing

Sports

Theatre

TV / Films

Vegetarian

Vitamins / Minerals

Voluntary Work

Walking

Watersport

Wildlife

Wine

SELECT ALL

HOUSEHOLD

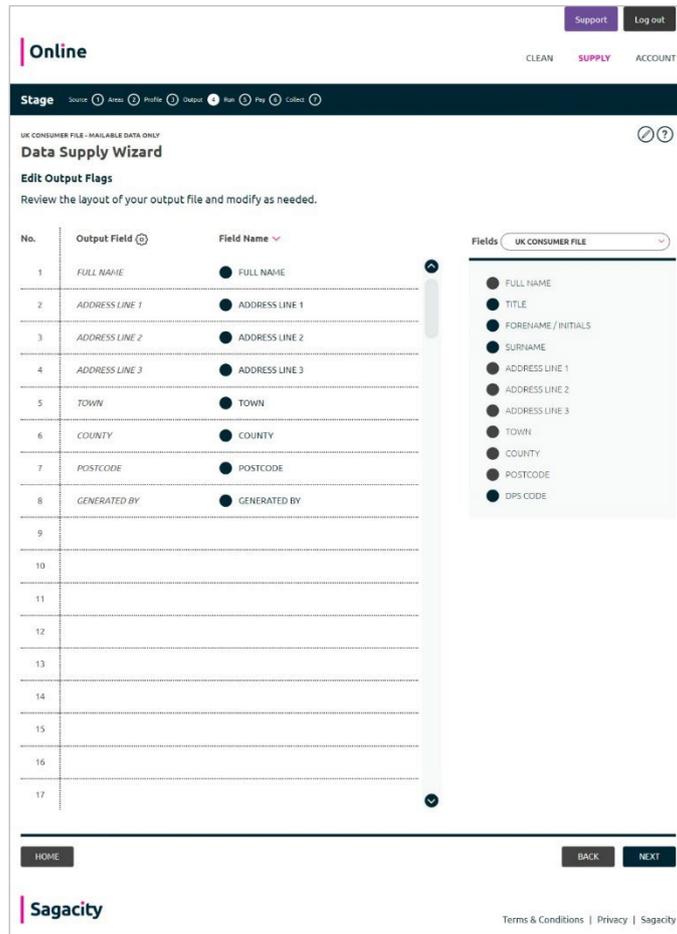
INSURANCE

PERSONAL

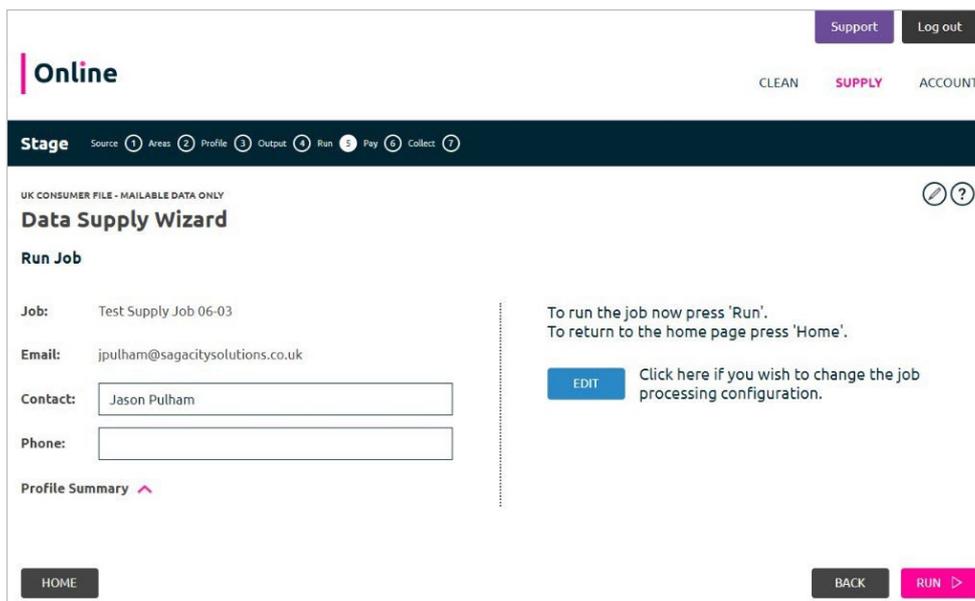
PROFILE SUMMARY

HOME
BACK
NEXT

**Stage 4:** Edit and confirm the output settings then click Next



Add a phone number. Use the Edit button to make any final changes to your selections. When you are ready, click Run.



**Online** | Support | Log out

CLEAN | **SUPPLY** | ACCOUNT

**Stage** | Source 1 | Areas 2 | Profile 3 | Output 4 | Run 5 | Play 6 | Collect 7

UK CONSUMER FILE - MAILABLE DATA ONLY

### Data Supply Wizard

**Processing Job**

**Job:** Test Supply Job 06-03

**Email:** jpulham@sagacitysolutions.co.uk

**Contact:** Jason Pulham

**Phone:** 01926626300

**Profile Summary** ^

Your job is now being processed.  
 You can monitor the progress of the job from the home page.  
 To cancel the job press 'Cancel'.  
 To return to the home page press 'Home'.

100 Running

CANCEL

HOME | BACK | NEXT

**Results:**

**Online** | Support | Log out

CLEAN | **SUPPLY** | ACCOUNT

**Stage** | Source 1 | Areas 2 | Profile 3 | Output 4 | Run 5 | Play 6 | Collect 7

UK CONSUMER FILE - MAILABLE DATA ONLY

### Data Supply Wizard

**Job Details**

Account Name: Sagacity Solutions  
 Job Name: Test Supply Job 06-03  
 Reference: 700021631-10236295  
 Processed At: 14:39 06/03/2023  
 Processed By: jpulham@sagacitysolutions.co.uk  
 Cost of Job: £127,615.50  
 VAT @ 20.00%: £25,523.10  
 Total Cost: £153,138.60 including VAT

Output Details

**File Summary**

UK Consumer File 1,607,012

HOME | BACK | NEXT

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Clicking on **Output Details** will provide more detail. You will also receive an email summarising the job results and cost.

**Stage 5:** You now have the option to purchase the job using a Credit Card or on Account if you are a Credit Account holder.

**\*As with Clean, applicable EULs need to be reviewed and accepted before selecting the payment type\***

Online Support Log out  
 CLEAN SUPPLY ACCOUNT

Stage Source Area Profile Output Run Pay Collect

UK CONSUMER FILE - AVAILABLE DATA ONLY

### Data Supply Wizard

**Purchase Results**

**End User Licences**

The following licences are required in order to purchase your job results. Please review the licence details and accept the conditions by clicking the "Accept" button.

Licence Name	Licence Status
Lifeskeetch	Licence not accepted
UK Consumer File	Licence not accepted

I confirm that I have read and accept the above End User Licence(s)

**Pay For Results**

Online Support Log out  
 CLEAN SUPPLY ACCOUNT

Stage Source Area Profile Output Run Pay Collect

UK CONSUMER FILE - AVAILABLE DATA ONLY

### Data Supply Wizard

**Purchase Results**

**End User Licences**

All required licences have been accepted.

**Pay for Results**

**Pay by account**

Cost of Job (Ex. VAT): £127615.50    Cost of Job (inc. VAT): £152138.60

Please note that this job is subject to a £10.00 minimum charge.

Please note: When you click 'Next', the charges for this job will be added to your monthly invoice.

Although you will be able to continue to review statistics, the actual results file for any 'unpaid' job will be deleted from the system seven days after processing.

Pay by credit card

# Accounts Section



Within the accounts section, you can manage your users, examine the costs of each service, connect to DEX (our secure file transfer service), apply for a credit account in extras, review licences and job histories.

## Help & Support

You can use the icon to access specific help on any process screen. The Sagacity team are here to help and support you to get the most from the Online. If you require technical assistance, please contact the **Online** support team. Help is available during normal office hours (Monday to Friday, 9.00am to 5.30pm) please email [client.support@sagacitysolutions.co.uk](mailto:client.support@sagacitysolutions.co.uk)

For information about the products and services available and help please contact your **Sagacity Account Manager directly or use:**

Call **020 7089 6400**

Email [enquiries@sagacitysolutions.co.uk](mailto:enquiries@sagacitysolutions.co.uk)

## Appendix

### Understanding the Clean results file

**The PAF.zip file** contains those records where the address information you uploaded was incorrect. Please update the address records on your database with the new details provided. The PAF.zip results file will be formatted as follows:

"Input Record fields", "PAF Change Flag", "Updated PAF Address fields" e.g.

Where the input record was: "1234", "Mr Smith", "1 The High Street", "Any Town", "Any County", "AB10 1AA", "01234 567890"

A postcode sector change (a PAF Change Flag of LS) would be shown as:

"1234", "Mr Smith", "1 The High Street", "Any Town", "Any County", "AB10 1AA", "01234 567890", "LS", "1 The High Street", "Any Town", "Any County", "AB10 8AA"

**The MOVERS.zip file** contains those records where the individual has moved house and we are able to provide a new address.

\* Please update the address records on your database with the new details provided. The MOVERS.zip results file will be formatted as follows:

"Input Record fields", "New Address fields"

e.g. Where the input record was: "1234", "Mr Smith", "1 The High Street", "Any Town", "Any County", "AB10 1AA", "01234 567890"

The output record will be: "1234", "Mr Smith", "1 The High Street", "Any Town", "Any County", "AB10 1AA", "01234 567890", "2 The Low Street", "Any New Town", "Any New County", "ZE10 8AA"

**The TPS.zip file** contains those records from your database where the telephone number provided matches details held on the TPS file.

\* Please identify these records on your database and flag or delete them to remove from future communications.

Calling a TPS registered number without the express permission of the individual is a breach of PECR and could incur a fine.

**The TPS.zip results file** will be formatted as follows:

"Input Record", "Y" e.g.

Where the input record was: "1234", "Mr Smith", "1 The High Street", "Any Town", "Any County", "AB10 1AA", "01234 567890"

The output record will be: "1234", "Mr Smith", "1 The High Street", "Any Town", "Any County", "AB10 1AA", "01234 567890", "Y"

**The MPS.zip file** contains those records from your database where the name and address information matches details held on the MPS file.

\* Please identify these records on your database and flag or delete them to remove from future communications.

Whilst sending direct mail to MPS registered individuals is not illegal, identifying and removing their details from your mailing file is industry best practice and a central tenet of the Direct & Data

Marketing Association (UK) Code of Practice and the British Codes of Advertising, Sales Promotion and Direct Marketing.

**The MPS.zip results file** will be formatted as follows:

"Input Record","Y" e.g.

Where the input record was: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890"

The output record will be: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890","Y"

**The SYO.zip file** contains those records that matched against the Honda (UK) Suppress Your Own file, which includes information from updates to the central Honda (UK) database.

\* Please identify these records on your database and flag or delete them to remove from future communications.

The SYO.zip results file will be formatted as follows:

"Input Record","Y" e.g.

Where the input record was: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890"

The output record will be: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890","Y"

**The GONEAWAY.zip file** contains those records where the individual on your file is no longer resident at the address provided.

\* Please identify these records on your database and flag or delete them to remove from future communications.

The GONEAWAY.zip results file will be formatted as follows:

"Input Record","Y" e.g.

Where the input record was: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890"

The output record will be: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890","Y"

**The DECEASED.zip file** contains those records from your uploaded file that have passed away.

\* Please identify these records on your database and flag or delete them to remove from future communications.

The DECEASED.zip results file will be formatted as follows: "Input Record","Y" e.g.

Where the input record was: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890"

The output record will be: "1234","Mr Smith","1 The High Street","Any Town","Any County","AB10 1AA","01234 567890","Y"

**The RESULTS.zip file** contains your complete input file, including records where no updates were added or matches were found.

The RESULTS.zip file will use the same field layout and text delimiters that were used for the input file you uploaded.

Each individual record within the file will have a list of new fields and flags corresponding to any suppression or enhancement matches that were applied. The file will include new field headers to enable you to identify the various flags.

#### Table of PAF Change Flags

Change flag values	
A1	Address Line 1 had been updated
Elements inserted	
IS	Sub building name
IB	Building name
IN	Building number
IT	Throughfare
IL	Locality
IC	County
IP	Postcode
Elements corrected	
CS	Sub building name
CB	Building name
CN	Building number
CT	Thoroughfare
CL	Locality
CC	County
CP	Postcode
Presentation changed	
PS	Sub building name
PB	Building name
PT	Thoroughfare
PL	Locality
PC	County
MR	Resolved to multiple residency
WR	Words remaining/unmatched