NCOA$^{Link™}$ ORDER FORM HELP GUIDELINE

INPUT MEDIA
Check the box that indicates how your input file will be sent.

INPUT FILE INFORMATION
1. List owner – This is the company that owns the list being processed. Under no circumstance can a Lettershop, Third Party or Broker be considered the list owner.

2. Input file name – The name of the file you are sending for processing.

3. File type – Check the type of file: Fixed field text, Delimited text, dBASE compatible or Other.
   - Other – Please specify file type. Additional charges may be associated with 'Other' file types.
   - NOTE: If you are providing a fixed field text file, a file layout is required to begin processing. If you are providing a file with more than 10 fields, a file layout is recommended. Output will be returned in same format as input.

4. Number of records – The total number of names and addresses on the file you are sending for processing.
   - Record Length – This applies to fixed field text files only.

5. What program do you use to maintain your list? – The software and version you are currently using to maintain your list.

OUTPUT OPTIONS
1. Processing requested
   NCOA^{Link} **Full Service – 48 months** with DPV, LACS^{Link} & Suite^{Link} –
   - Provides new address information when appropriate, and provides footnotes when no match is found between the input name and address and what is on the NCOA^{Link} database. All addresses are run through CASS™ and DPV™ before the matching process begins.
   - Advanced address correction – A service which attempts to repair or replace incorrect or missing address components for those addresses not ZIP + 4® coded.
   - Apartment append – A service which attempts to assign or correct apartment numbers.
   - Proprietary change of address – A service which uses proprietary data to provide additional moves using sources other than the USPS®
   - NCOA^{Link} **Service – 18 months** with DPV LACS^{Link} & Suite^{Link} – Same processing as Full Service, but only matches 18 months of moves.

2. Matching Logic for residential moves
   - Standard Logic: For family moves, the matching is based on last name and address. For individual moves, the matching is based on first name, middle name, last name, title and address. Matches for both move types are provided.
   - Individual Logic: Matches are made on first name, middle name, last name, title and address. New addresses are only provided for individuals who filed the change of address.

3. Output text
   - Proper Case – Example: Lorton Data, 2 Pine Tree Dr Ste 302, Arden Hills MN
   - UPPER CASE – Example: LORTON DATA, 2 PINE TREE DR STE 302, ARDEN HILLS MN

4. Output Format
   - Output C – Overwrites your original address fields with change of address information if a move was identified. If no move was found, then the standardized address information will be applied.
   - Output 800 – Appends data to the end of your input record. The standardized address information is first, followed by the change of address information for a total record length of 800, provided your input record length is under 200. If your input record length is over 200, we will pad to the next hundred and then append additional information.
   - Legacy Output 500 – Appends data to the end of your input record. The standardized address information is first, followed by the change of address information for a total record length of 500, provided your input record length is under 200. If your input record length is over 200, we will pad to the next hundred and then append additional information.

5. Optional reports – A report of moves, possible moves and nixies. The report provides your input address and the new address for moves, along with the input address and return codes indicating potential moves for records where we could not make the match due to rules. When requested, the report includes input addresses that are ZIP + 4® non-matches. The report can be sent electronically or on paper.

6. Special instructions – If you need Duplicate Elimination, Presort, Demographic or Telephone Append, Geo-Coding, or any of our other services, contact our sales staff at 651.203.8290 or sales@lortondata.com.

7. Shipping – Indicate how we should return your completed project.

INFORMATION REQUIRED BY USPS® FOR PROCESSING
1. List name – The name of the list being processed. For example, the list owner may have a customer list and a prospect list.

2. How often will you run NCOA^{Link} on this list annually? – The number of times you will run this list through NCOA^{Link} on an annual basis.

3. Entrypoint ZIP Code™ – ZIP Code of the Post Office™ from which your bulk mail is sent.

4. List sold to – If you are selling the list processed, you are required to fill in the person or company the list is being sold to.

5. Class of Mail – Specify what class/es of mail you send.

BILLING INFORMATION
Provide your payment option and appropriate information. FTP and email transfers require a credit card.

AUTHORIZATION
Please sign and date form. We cannot process a job without the signature and date.

NCOA^{Link™} PROCESSING ORDER FORM

Lorton data
information ▪ right ▪ now

Customer name and address (Please print or type)

Company	Contact name
Address	City, state, ZIP + 4
Phone	Fax	Email

INPUT MEDIA

☐ **Web File Transfer** https://ws.lortondata.com/FileTransfer/UploadForm.aspx ☐ **FTP** ftp.lortondata.com
☐ Other: _____

INPUT FILE INFORMATION

1. List owner: _____ (Must be same name as list owner on Processing Acknowledgment Form)
2. Input file name: _____ Password: _____
3. File type: ☐ Fixed field text ☐ Delimited text ☐ dBASE compatible ☐ Other: _____

   NOTE: If you are providing a fixed field text file, a file layout is **required** to begin processing. If you are providing a file with **more than** 10 fields, a file layout is recommended. Output will be returned in same format as sent.

4. Number of records: _____ Record length (if fixed field text file): _____

   Important: Foreign addresses may be negatively affected by this processing. We recommend that you remove foreign addresses from your file.

5. What program do you use to maintain your list? ☐ FoxPro ☐ dBASE ☐ Donor2 ☐ FileMaker Pro ☐ Raiser's Edge ☐ Mail Order Manager (M.O.M.) ☐ My Advanced Mail List ☐ FundMaster ☐ Mail Miser ☐ FundRaiser Professional ☐ ArcList ☐ Mail List Monarch ☐ Mail Manager ☐ Other: _____

OUTPUT OPTIONS

NOTE: There is a $25.00 handling fee to process this form.

1. Processing requested:
   ☐ NCOA^{Link} Full Service – 48 months with DPV, LACS^{Link} & Suite^{Link} : $ 2.75 / 1000 input records $ 95.00 minimum
      ☐ Options: additional $1.00 / 1000 input records, $ 35.00 minimum
         ☐ Advanced address correction $ 0.07 / match
         ☐ Apartment append $ 0.10 / match (requires advanced address correction)
         ☐ Proprietary change of address* $ 0.10 / match (requires advanced address correction)
            ***NOTE:** Proprietary change of address requires a separate Processing Acknowledgment Form and selecting this option changes your NCOA^{Link} price to $4.75 / 1000 input records, $95.00 minimum

   ☐ NCOA^{Link} Limited Service – 18 months with DPV, LACS^{Link} & Suite^{Link} : $ 1.75 / 1000 input records $ 95.00 minimum

2. Matching Logic for residential moves: ☐ Standard Logic ☐ Individual Logic
   Note: Individual Logic will provide only new address information for Individual matches and could result in a significantly reduced match rate.
3. Output text: ☐ Proper Case ☐ UPPER CASE
4. Output format: ☐ Output C ☐ Output 800 ☐ Legacy 500
5. Optional reports: (5¢ per page, $10 minimum per report, 9 - 10 addresses per 8.5 x 11 page)
   List of NCOA^{Link} moves, possible moves & nixies: ☐ Yes ☐ Electronic or ☐ Paper
   Including ZIP + 4 non-matches: ☐ Yes ☐ Electronic or ☐ Paper
6. Special instructions (Please email or call with details)
7. Delivery: ☐ Web ☐ FTP ☐ Other

INFORMATION REQUIRED BY USPS® FOR PROCESSING

1. List name:
   - ☐ Mailing list
   - ☐ Member list
   - ☐ Customer list
   - ☐ Prospect list
   - ☐ Donor list
   - ☐ Other:_____
2. How often will you run NCOALink on this list annually?_____
3. Entrypoint ZIP Code:_____
4. List sold to:_____ (Fill this in if you are selling the list being processed)
5. Class of Mail: ☐ First-Class Mail ☐ Periodical ☐ Standard ☐ Package Services (Check all that apply)

NOTE: The information in this section is being collected by the USPS® to comply with Federal Regulations and the Privacy Act of 1974. If you do not understand a question please refer to the order form help guideline or call our technical support staff.

SENDING A JOB TO LORTON DATA

Send completed order form and file to:

Web File Transfer**:**
https://ws.lortondata.com/FileTransfer/UploadForm.aspx

FTP: ftp.lortondata.com/incoming

Fax: 651-203-8299

If not sending file via FTP, send physical media and form to:
Lorton Data Inc
2 Pine Tree Dr Ste 302
Arden Hills MN 55112-3715

For more information:
Website: www.lortondata.com
Support Line: 651-203-8290

CHECKLIST

To avoid processing delays, do the following:
- ☐ Fill out order form completely
- ☐ Complete a Processing Acknowledgment Form (Must be renewed annually)
- ☐ Send in order form and Processing Acknowledgment Form

BILLING INFORMATION

Electronic transfers must be paid by credit card. Lorton Data accepts *Visa, MasterCard, American Express* and *Discover*'

COD: Fax amount before shipping?
   ☐ Yes ☐ No

Card #:_____

Exp. Date:_____

Name on card:_____

Signature:_____

Credit card billing address & ZIP Code:_____

_____

AUTHORIZATION (Please read and sign to authorize processing. Must be signed for processing to proceed.)

The undersigned, as an authorized agent of the Customer, hereby authorizes Lorton Data to process the Customer's files as indicated in the "Output Options" section of this form and the Customer agrees to pay the price listed for each of the output options selected. The Customer understands the nature, scope and limitations of the processing as well as the nature of the output to be generated by Lorton Data on behalf of the Customer. Customer agrees to examine output data for validity. Customer will not hold Lorton Data liable for any damages greater than the charges herein resulting from the use of invalid data. The Customer further understands that this order is subject to and will be processed solely in accordance with Lorton Data's General Terms and Conditions (Rev 4-10/19) as set forth on side c of this form.

Authorized by_____ Title_____ Date_____

Name (Please print) _____

2 Pine Tree Drive Ste 302
Arden Hills, MN 55112
Ph: 651.203.8290 FX: 651.203.8299

LORTON DATA, INC. GENERAL TERMS AND CONDITIONS

(1) <u>Invoicing</u>. Unless otherwise provided for under Order Billing Information, Lorton Data, Inc. ("Lorton Data") will invoice You* for services rendered and goods provided in accordance with Lorton Data's price schedule in effect on the date of Your* Order. In addition, Lorton Data will invoice You for all out-of-pocket costs and expenses including postage, freight, shipping and handling, and insurance. Invoices are due upon receipt or such later date as pre-approved by Lorton Data's credit department. Invoices not paid in full within fifteen (15) days of the due date will accrue a service charge at the rate of 1.5% per month on the unpaid balance from the due date.

(2) <u>Specifications and Approvals</u>. If You wish Your Order to comply with a certain job specification, You must provide such job specification to Lorton Data with Your Order. All additions or changes to job specifications must be in writing and acknowledged by an authorized Lorton Data employee. If You do not provide Lorton Data with complete, written job specifications or two or more elements of Your written job specifications are contradictory, then Lorton Data's standard job specifications and best judgment will govern. Lorton Data may conclusively rely upon its interpretations of, and will not be liable for failure to comply with, any verbal instructions. When Lorton Data submits counts, samples or other interim results to You for Your review and approval, You shall promptly review the same, including reviewing the same for reasonableness, and advise Lorton Data of any faults, inaccuracies or problems. Unless and to the extent You promptly and specifically object, Lorton Data shall be entitled to continue processing Your Order based upon the correctness of such interim results.

(3) <u>Deadlines</u>. Lorton Data will use its best efforts to meet specific deadline requests made at the time You place Your Order. Deadline requests are, however, not binding on Lorton Data, and Lorton Data is not liable, in any way, for failure to meet a specific deadline request.

(4) <u>Customer Responsibilities</u>. To enable Lorton Data to timely and properly complete Your Order, You are responsible for and will:

(a) provide Lorton Data with all necessary lists, records and other data applicable to Your Order,
(b) provide Lorton Data with complete job specifications, in writing and/or on the input screen(s) of a program provided by Lorton Data,
(c) provide Lorton Data with layouts for Your data. If no layouts are provided, Lorton Data will, at Your cost, make a reasonable effort to interpret Your data and be entitled to rely conclusively on its interpretations thereof,
(d) promptly review Lorton Data counts, samples or other interim results, including reviewing same for reasonableness, and approve such results or advise Lorton Data of any faults, inaccuracies, or problems,
(e) maintain adequate back-up copies of data furnished to Lorton Data to enable Lorton Data to regenerate such data which, for any reason, is lost, damaged or destroyed. If You do not maintain adequate back-up data, Lorton Data's liability for lost, damaged or destroyed data shall be limited solely to media costs not to exceed the liquidated damages sum of $250. Lorton Data shall not be liable for data or material damaged in transit,
(f) promptly examine all final output data received from Lorton Data for validity prior to use.

(5) <u>Customer Warranties and Representations</u>. You hereby warrant and represent that:

(a) You own or have obtained proper authorization or approval to use or reuse all data provided to Lorton Data for processing on Your behalf. You agree to indemnify and hold Lorton Data and Lorton Data's officers, directors, agents and employees harmless against any and all claims, causes of action, suits, proceedings, losses, damages, demands, fees, expenses, fines, penalties and costs (including reasonable attorneys' fees and expenses) arising directly or indirectly out of Lorton Data's processing of such data on Your behalf.
(b) You understand that use of data obtained through the processing authorized may be governed by State or Federal Law. You represent that Your purposes for obtaining this data through this processing are legitimate under these laws, and agree to abide by all State and Federal Laws regarding the use of such data.

(6) <u>Lorton Data's Warranties and Representations</u>. Lorton Data hereby warrants and represents that:

(a) all of its services shall be performed in a workmanlike manner in accordance with generally accepted industry standards, and
(b) it shall not knowingly infringe upon any then existing intellectual property right of a third party.

EXCEPT AS PROVIDED IN THIS SECTION (6), LORTON DATA MAKES NO WARRANTIES OF ANY KIND AND ALL OTHER WARRANTIES, EXPRESS OR IMPLIED, ARE HEREBY DISCLAIMED, INCLUDING WITHOUT LIMITATION THAT THE SERVICES, PRODUCTS AND RELATED OPERATIONS PERFORMED HEREUNDER WILL BE ACCURATE OR FREE FROM ERROR, AND INCLUDING WITHOUT LIMITATION THE IMPLIED WARRANTIES OF MERCHANTABILITY AND FITNESS FOR A PARTICULAR PURPOSE AND THOSE ARISING BY STATUTE OR OTHERWISE IN LAW OR FROM A COURSE OF DEALING OR USAGE IN THE TRADE.

(7) <u>Disclaimers</u>. LORTON DATA SHALL NOT BE LIABLE TO YOU OR TO ANY THIRD PARTY FOR ANY INDIRECT, INCIDENTAL, SPECIAL, OR CONSEQUENTIAL DAMAGES ARISING OUT OF THE WORK OR PRODUCT HEREIN AUTHORIZED INCLUDING, BUT NOT LIMITED TO, DAMAGES FOR LOST PROFITS, LOST SAVINGS, OR LOST DATA, OR FOR ANY DAMAGE RELATED TO THE USE OF OR INABILITY TO USE THE PROCESSED DATA GENERATED BY LORTON DATA EVEN IF LORTON DATA HAS BEEN ADVISED OF THE POSSIBILITY OF ANY SUCH DAMAGES. LORTON DATA'S TOTAL LIABILITY SHALL BE FOR THOSE DIRECT DAMAGES SUFFERED BY YOU DUE TO LORTON DATA'S PERFORMANCE UNDER THIS ORDER IN AN AMOUNT NOT TO EXCEED FEES ACTUALLY PAID BY YOU TO LORTON DATA FOR SERVICES DIRECTLY RELATED TO THE DAMAGES SUFFERED.

(8) <u>Confidentiality</u>. Lists, records, spreadsheets, manuscripts, diagrams, and/or graphics that You provide to Lorton Data shall be considered "Confidential Information". Lorton Data will disclose Confidential Information only to its employees and/or vendors who may need to know it in order to process Your Order, and to authorized persons designated by You. Lorton Data also agrees not to use such Confidential Information on its own behalf or for its own interest without Your prior consent. Confidential Information shall not include any information that (i) is or becomes available to the public through no fault of Lorton Data, (ii) is lawfully received by Lorton Data from a third party that is not subject to disclosure restrictions, (iii) is independently developed by Lorton Data without using Confidential Information, (iv) has been approved for public release by Your authorization; or (v) is known to Lorton Data without a duty of confidentiality prior to first receipt of it from You.

For data quality purposes, Lorton Data may compile statistical information on names and addresses, and information on individual address corrections. Such information shall belong to Lorton Data and shall not be considered Confidential Information as defined in this Section (8). Additionally, where data is submitted to the USPS for correction at Your request, the USPS may also retain such information.

(9) <u>Force Majeure</u>. Lorton Data shall not be in default by reason of any failure in its performance if such failure to perform is otherwise due to causes beyond the reasonable control of Lorton Data, which may include, without limitation, the failure of computers, equipment, or software, or the illness, disability or resignation of Lorton Data's personnel or contractors, to the extent that such default could not be resolved by Lorton Data with reasonable efforts.

(10) <u>Subcontractors</u>. Lorton Data shall have the right to subcontract any or all of its obligations to one or more parties, provided that Lorton Data shall oversee all work performed by subcontractors, and provided that Lorton Data shall remain responsible for the delivery and quality of the goods and/or services ordered herein.

(11) <u>Governing Law</u>. The provision of goods and services covered hereby and all Terms and Conditions hereof shall be governed by, construed and enforced under the internal laws (and not the laws of conflicts) of the State of Minnesota. All actions with respect hereto shall be brought in the state and federal district courts of Hennepin County, MN, and in no other jurisdiction.

(12) <u>Entire Agreement</u>. This Document is the final expression of the Terms and Conditions that govern all Orders placed by You with Lorton Data for the provisions of goods and/or services and may not be contradicted by evidence of any alleged oral agreement or other written agreement. Please read it and keep it for your records. Any unilateral purchase order shall be effective only to specify the services and/or goods ordered and the quantities, and shall be otherwise governed by these Terms and Conditions. If You purchase list rental products or services, the Lorton Data List Rental Terms and Conditions also apply, and are incorporated here by reference.

* The terms "You" and "Your" as used herein refer to the customer ordering goods and/or services from Lorton Data.   Rev 4 - 10/19/12