



# FirstSort

## Customer Guide

v1.4

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# 1.0 FirstSort Overview

FirstSort offers customers a competitive and flexible service by sorting machine-readable letters automatically.

This service aims to deliver on the 1st working day (Mon-Sat) after the day of collection for selected regions. For other areas, the service aims to deliver mail items within 2-3 working days after the day of collection.

## 1.1 FirstSort service summary\*

### Day 0-1

- Regional mail collected from customers
- Mail delivered to Whistl sortation centre
- Mail machine sorted – split between regional vs. national according SSC

#### Regional mail

- Trays of sorted regional mail delivered to Royal Mail IMC
- RM local sortation

#### National mail

- National mail sorted on a 2-3 day pass
- Bags of national mail delivered to the Whistl radial hubs
- Bags of national mail handed over to RM IMC

### Day 1

Regional mail delivered by the Royal Mail

### Day 1-2

National Mail delivered to the RM IMC

### Day 2-3

National Mail delivered by the Royal Mail

\* The service aims are targets only and the time and date for processing and delivery are not guaranteed. Whistl will not be liable for the speed of collection, processing, handover and delivery which are affected (directly or indirectly) by any event or circumstance outside Whistl's reasonable control (see below for more details) or by an act or omission of the Customer (or its employees, agents or contractors). The dates for collection, processing, handover and delivery exclude any day which is a public holiday in any part of the United Kingdom.

## Summary of Premium regional services

Service	Format Weight Bands						
	Letters (DL/C5)	Large (Letter C4)	Packets	0-100g	101-250g	251-500g	501-750g
FirstSort	Y	N	N	Y	N	N	N

## 1.2 Force majeure events

Whistl is not liable for delay in performing, or failure to perform, any of its obligations if such delay or failure results from any event or combination of events adversely affecting the ability of Whistl to perform its obligations where such event arises from or is attributable to acts, events, omissions or accidents that were beyond the reasonable control of Whistl. These include (without limitation) strikes, lock-outs or other industrial disputes (whether involving the workforce of Whistl or any other party), failure of a utility service, disruption to transport network, act of God, war, riot, civil commotion, epidemic, pandemic, acts (or threat) of terrorism, malicious damage, compliance with any law or governmental order, rule, regulation or direction, acts of local or central government or other competent authorities, seizure or forfeiture under legal process, inherent liability to wastage in bulk or weight, faulty design, latent defect or inherent defect, vice or natural deterioration of the items, insufficient or improper packing, insufficient or improper labelling or addressing, accident, breakdown of plant or machinery, fire, earthquake, explosion, flood, storm, ice, frost or default of Whistl or its carriers or subcontractors and any event or

other consequences arising as a result of or in connection with the full or partial withdrawal of the United Kingdom after the transition period from the European Union.

# 2.0 Entry Qualifications

## 2.1 Minimum volumes

The minimum volume customers must reach prior to utilising Whistl's FirstSort service is 250 mailing items per mailing, per collection.

## 2.2 Addressing standards

Customers must ensure that the Addressing Standards set out in **section 2.2.1** are met.

Customers must also ensure that each mailing item is addressed to its recipient so that the address is visible and legible at all times.

Failure to meet required standards will result in Whistl taking action in accordance with the Procedures for Handling Non-compliant Postings (see **section 8** of the Customer Guide).

### 2.2.1 Post addressing

Customers must take into account changes to postcodes and other address information and ensure that new records are accurate (e.g. quarterly updates). Cleaning address data should not be a one-off activity, it should be an ongoing process.

The best way to ensure the accuracy of address files is maintained is to link databases to Royal Mail's Postcode Address File (PAF®) using one of the third party products based on PAF®.

PAF® contains over 27 million UK addresses including 1.7 million business addresses and 1.7 million postcodes, which Royal Mail continually update to maintain accuracy.

### 2.2.2 The elements of an address

To meet the required address standards each address includes one premise element, one thoroughfare element, one locality element and the postcode as a minimum. Other elements may be included. If there is no thoroughfare element contained in PAF® this need not be included.

To fully explain these requirements, each element is described here:

Organisation	J Bloggs	}	Premise elements
Sub-building	A Posting House		
Building name	South Wing		
Building number	Bell House	}	Thoroughfare elements
Dependent thoroughfare	B-25 Bell Complex		
Thoroughfare	The Mews	}	Location elements
Double dependent locality	300 Western Road		
Dependent locality	Otterley		
Post town	Hedge End	}	Postcode elements
Postcode	OXFORD		
	OX4 5ZZ		

#### i) Premise elements

Customers must include at least one of these four elements, so that a single delivery point is defined. Customers do not have to include all the premise elements (unless the premise elements used do not sufficiently describe an address), even if they are included in PAF®.

#### ii) Thoroughfare elements

PAF® will give one of three possible combinations:

- No thoroughfare – no need to include anything in this part of the address.
- A thoroughfare but not a dependent thoroughfare
  - include the thoroughfare.
- Both a dependent thoroughfare and a thoroughfare
  - include the former. If space allows customers can also include the thoroughfare, though it's not compulsory.

#### iii) Locality elements

Customers must include at least one locality element, even if they are included in PAF®. The first letter(s) of the post town must always be in capital letters, e.g. Milton Keynes. The post town can also be printed in capital letters (uppercase), e.g. BIRMINGHAM on a line on its own.

#### iv) Postcode

The address of all mailing items must contain a full and accurate postcode. The postcode must generate an address from PAF® that can be matched to the minimum requirements above (at least one premise element, one thoroughfare element and one locality element). The postcode must always appear in capital letters on its own as the last line of the address. The postcode must NOT be:

- Printed on the same line as the town or county.
- Underlined or punctuated.

Two spaces must be included between the two parts of the postcode. The first part i.e. OX4 is the outward code, the second i.e. 5ZZ is the inward code.

### 2.3 Suitable fonts and print formats

Comprehensive testing has been completed by our machine supplier, and a list of recommended fonts has been provided. See **Appendix A** for details.

To achieve maximum read rates, only certain fonts can be used and the print quality must be of a high standard. E.g. using typefaces that are more unevenly spaced than others, printing labels on a dot matrix printer or on a printer that is running low on ink may cause the item to be rejected by our sortation machines, which means having to resort to manual sortation causing delay and affecting the rate charged.

### 2.4 Item dimensions & weight

Any item defined as a letter can be sent through Whistl provided it meets the following requirements. The below specifications relate to the letter (DL and C5) envelope:

	Minimum	Maximum
<b>Length (mm)</b>	140	240
<b>Height (mm)</b>	90	165
<b>Thickness (mm)</b>	0.25	5
<b>Weight (mm)</b>	2	100*

# 3.0 Indicia For FirstSort

Whistl's sortation machines can only accept blank envelopes without the Whistl indicia, and this will be printed as it is sorted through the sortation machine. Customers must still indicate on the tray card that they need to have the FirstSort indicia sprayed onto the mail piece.

Mailing items will only be accepted at Whistl DSA Centres if they bear an indicia approved by Whistl. The indicia cannot be used to access retail end-to-end services or for any other purpose than as set out in the Agreement and this Guide

## 3.1 FirstSort indicia

Envelopes should be white or light coloured and free from graphics or print, so that the indicia will show up on the mail piece when it is sprayed on.

## 3.2 Return addresses and undeliverable mail

Customers must ensure that every mailing item is clearly marked with a return address.

Return addresses that are pre-printed on the reverse side an envelope must be within the 40mm zone from the top of the mail piece, but not in the Royal Mail return mail mark zone – an area 40mm x 40mm from the top left of the reverse side of the envelope. Return addresses that are pre-printed on the front of an envelope must NOT interfere with the indicia zone and extend no lower than 28mm from the top edge of the envelope. The return address must also be no closer than 12mm to the delivery address.

It is recommended that that the return address is always preceded with 'Return Address'.

Any undeliverable mail will be returned to the UK return to sender address, detailed on the mailing item. The return address should consist of:

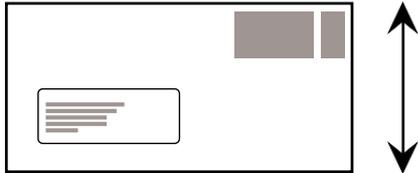
- PO Box Number (optional)
- The Customer Reference Number. This is optional, each customer has one or more unique four digit identification numbers ascribed to them e.g. one number may denote a promotional mailing, one may denote a transactional mailing
- The customer name (fixed element of the address)
- Post town (fixed element of the address)
- PO Box Postcode (fixed element of the address)

Any alterations to this format should be clarified with a Whistl Account Manager. It is the responsibility of customers to ensure compliance with the return address format and position on the envelope.

# 4.0 Mail Presentation

Mail must be presented in the mail trays provided by Whistl. Envelopes must be placed in the trays un-banded and should all be facing in the same direction and the correct way up. Trays should not be overfilled as it makes handling difficult and can cause envelopes to stick.

In the case of letters mail should be placed with the address the right way up and sitting upright.



Note: mail in trays cannot be double stacked

## 4.1 Mailing Items

Customers must ensure wherever possible that mailing items of a similar weight, shape or size are securely placed in Whistl trays. The number of mailing items in each tray will depend on the nature of the mailing items, size and thickness.

Mailings that are presented must be separated according to format and service:

- Letter
- If mail needs to be sprayed with an indicia or return address

## 4.2 Mail sequence

FirstSort mail should be presented in a geographically random order. This maximises throughput of the process and minimises risk of delay.

The easiest way ensure mail is in random order is to stack the 'print file' by surname in alphabetical order.

## 4.3 Flexibility

Items must be flexible enough to bend into an 'S' along the longest edge.

The 'S' test indicates when a mail piece is too stiff to be safely processed without being damaged by the equipment or damaging the equipment.

## 4.4 Non-machineable items

The following are classed as non-machineable and cannot be processed under the FirstSort service.

- Polywrap, plastic or window envelopes without plastic film
- Inflexible objects such as coins, pens and keys
- >5mm thick per item
- Heavier than 100g per item

## 4.5 Paper weight

- Envelopes – 70gsm minimum
- Postcards – 200gsm minimum with a minimum thickness of 0.25mm thick

## 4.6 Sealing

Each item must be well sealed, taking care to avoid using too much gum or excess water which could result in envelopes sticking together.

- Metal clips or staples must not be used
- The items must be sealed on all sides

## 4.7 Window envelopes

Requirements for addresses to be read through a window are as follows.

- The window position must be at least 15mm from the left hand edge of the envelope and at least 18mm from its bottom edge
- The maximum gloss value of the window material should be 150 when measured at 60° in accordance with ASTM 2457 standard test method for specular gloss of plastic films
- The window haze should not exceed 75% in accordance with ASTM D1003 standard test method for haze of plastic films
- The item inside the envelope must fit securely and not move around and the address must always be fully visible
- The window should not infringe any of the clear zones on the mail piece. See **Appendix B** for the optimum mail template.

## 4.8 Address

- All lines of the address must be justified left.
- The extremities of the address block must be at least 5mm away from the edge of the label or window.
- Excessively skewed addresses cannot be read. The Whistl sortation machine can only tolerate a maximum skew of plus or minus five degrees from the horizontal.
- Punctuation should be avoided e.g. don't put commas or full stops at the end of lines.

## 4.9 Address block

The address block is defined as an imaginary box that surrounds the address including the addressee's name. There must be a 5mm clear zone around this block. See **Appendix B** for details.

If you want to print a reference number or code near the address, then this must be printed either

1. Within the address block as the top line of the address and left justified to form part of the address  
or
2. Outside the 5mm clear zone

## 4.10 Clear zones

The following areas should be left clear of any markings. These areas are called 'clear zones' and are used to print and read codes and locate the address. The address must not encroach any of these clear zones:

- 5mm around the address.
- 18mm from the bottom edge and 115mm from the right edge.
- A zone 15mm from the right hand edge and 70mm from the bottom edge.
- A zone 115mm from the right hand edge and 10mm high; with the zone's top edge starting 70mm from the bottom edge of the item.
- No part of the address should fall within 40mm of the top of the mail piece.

## 4.11 Paper colour

The most suitable colours for envelopes are white, cream or buff. Other colours may be used, so long as they are light or pastel shades which contrast by at least 50% in tone with the address. Please do not use red or dark coloured envelopes as address and codes will be difficult to machine-read.

## 4.12 Printing

The address must be darker than the paper. For example don't print the address in white ink on dark paper. Please do not use red or dark colour ink for printing logos, designs or text behind the address as they cannot be machine-read.

Whistl will supply the relevant equipment for the final transportation of mail to Whistl centres. Whistl will base the initial tray and container allocation on the forecast figures provided. Whistl Client Services will determine a replenishment of Whistl trays and magnums based on the weekly forecast provided.

# 5.0 Consumables

## Re-ordering equipment

Please contact your Account Manager and refer to the notice period for trays and magnums below

### 5.1 Trays & tray labels

Whistl will supply trays and lids for the sole use of conveying Whistl specific mailings from the customer nominated site to the Whistl Sorting Centre.

Whistl trays must not be used for moving mailing items between either the customer's sites or agent's sites without prior agreement with Whistl Client Services.

Customers need to give Whistl 48hrs notice of their requirements and Whistl will endeavour to meet the required amounts within the notice period.

- 0-200 trays require 24 hours' notice
- 201-400 trays require 48 hours' notice
- 400+ trays require 96 hours' notice

Whistl will also supply customers with a tray label template that needs to be completed for each mailing. The tray label consists of a barcode that is scanned once it reaches the Whistl depot. Each tray label must detail the service, the format of the mailing, collection date and pre-printing instructions for indicia and 'if undelivered' address.

### 5.2 E-Dockets and Collection Receipts

#### E-Dockets

This tool has been designed to be easily accessible via the Whistl website. The tool allows you to declare your daily volumes for each of Whistl's unsorted services: PremierSort, PremierSort Flex and AllSort. It also allows you to create a unique tray card, which should accompany every mailing.

Whistl will provide the customer with a login at the initial customer implementation. If you are an existing customer please contact your Whistl Account Manager for your login details.

Please refer to the E-Docket customer guide for more information

#### Collection Receipts

Whistl will provide collection books at initial implementation.

Customers are required to complete a collection receipt with the specific number and type of mailings, number of trays/yorks/magnums from the customer nominated site to the Whistl Sorting Centre.

Four signed copies of the collection receipt are required. These will be checked, timed and dated by the Whistl collection driver and a customer employee after the Whistl vehicle is loaded. Three copies will be retained by Whistl and the other by the customer as receipt of collection.

The handover of mailing items and the signing of the collection receipt does not constitute acceptance of the mailing items by Whistl. Acceptance of a mailing by Whistl only occurs after Whistl Goods In and QMC mail verification checks have taken place and all, if any, issues have been resolved. A mailing will be deemed to have been accepted by Whistl and subsequently Royal Mail.

Example of a collection receipt:

# Collection receipt

## Customer Services

1. Collection Details	2. PremierSort Flex ■ FirstSort ■ PremierSort ■	3. AllSort ■
Customer name	<b>SERVICE</b>	<b>QUANTITY</b>
Date	<b>ITEMS</b>	Magnums   Yorks   Bags   Trays
Customer ID	<b>TRAYS</b>	AllSort
Collection address	<b>MAGNUMS</b>	<b>QUANTITY BY SERVICE</b>
	PremierSort Flex Letter – 2/3 day	Letter   Large Letter   Packet   Parcel
	PremierSort Flex Large letter – 2/3 day	AllSort National
		<b>QUANTITY BY SERVICE</b>
Vehicle number	FirstSort Letters – 1/3 day	International
Arrival time		BFPO
Departure time		<b>WHISTL USE ONLY</b>
Driver name	PremierSort Heavy large letter – 3 day	Goods in name
Signature	PremierSort Packet – 3 day	Goods in signature
Customer name		
Signature		

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White Copy: Whistl Operations, Yellow Copy: Whistl Accounts, Blue Copy: Whistl Local, Green Copy: Transport, Pink Copy: Customer



# 6.0 Collection Process

## 6.1 Collection times

Standard collection times will be set up prior to the first collection and will be regarded as fixed from this point. However, these collection times are flexible if found to be mutually agreeable.

## 6.2 Collection time re-arrangements

Any requests to change collection times must be made by e-mail to Whistl Client Services and may require at least 14 working days to be processed. Whistl Client Services will confirm by e-mail, subject to capacity and capability, whether the change of collection time is acceptable. Whilst Whistl will endeavour to meet requirements, it may not be possible in every instance. The final decision regarding the allocation of collection times rests with Whistl.

## 6.3 Customer health and safety procedures

Whistl require all drivers to wear safety shoes and high visibility jackets whilst on customer premises and comply with all site traffic rules. Drivers should only have access to those areas directly related to the handover of mailing items, unless previously agreed with Whistl.

## 6.4 Unloading and handover

- Each separate mailing must be unloaded into separate containers which will facilitate the revenue protection checks against each mailing.
- Where Customers have been provided with containers, customers are responsible for loading and unloading the containers when and where directed by the Whistl driver.
- All mailings handed over to a Whistl driver must be accompanied by a collection receipt. At handover, the Whistl employee will sign, time and date both copies of the collection receipt. Whistl and the customer's driver will, each, retain one copy of the collection receipt.

## 6.5 Contingency

In the event of customer premises being inaccessible for any reason, customers must notify Whistl of any alternative arrangements and any subsequent change to normal practice at the earliest opportunity.

# 7.0 Procedures For Handling Non-Compliant Postings

Whistl reserves the right to sample a mailing to ensure compliance with the Agreement. Failure to meet required standards will result in Whistl taking action in accordance with the Procedures for Handling Non-compliant Mailings/Postings.

- If after revenue protection checks Whistl has identified that a mailing fails to comply with the Agreement, Whistl will notify the customer, by telephone and electronically, and offer an opportunity to inspect the mail as soon as is reasonably practicable after identifying the error, but no later than 24 hours after notification. If following inspection (or the expiry of the 24 hour period) Whistl remains satisfied that there has been an error, Whistl may proceed to implement the procedures within this section.
- The following table details the actions Whistl may take in the event of non-compliance. Please note, 'Relevant Segment of the Posting' means that part of the mailing which relates to an individual mailing where non-compliance has been identified.

## 7.1 Collections

Issue	Resultant and corrective actions where applicable
Posting unavailable at collection	If a pre-notified posting is not available for collection on the nominated day despite the pre-notification that posting will be considered void and will be logged by Whistl.
Delay of collection	If customers are unable to meet the agreed collection time and Whistl is not contacted to agree the delay of the collection, Whistl may not accept the handover of the posting.

## 7.2 Documentation

Issue	Resultant and corrective actions where applicable
No signed collection receipt	If the relevant collection receipt has not been signed by a customer employee, Whistl will not accept the posting until confirmation of the collection volume has been received.

## 7.3 Addressing standards

Issue	Resultant and corrective actions where applicable
Mailing items that fail to meet the addressing standards as specified in <b>Section 2.2</b> of the Customer Guide	<ul style="list-style-type: none"> <li>• If the amount of reject mail is &gt; 5% of the total mailing, then the items will be manually sorted if Whistl agree it is operationally feasible to process. In this case the customer will be charged at the defined tariff rate for the rejected mail as set out in the contract agreement and the mail will be processed one day later.</li> <li>• If the amount of reject mail is less than 5% of the total mailing, then Whistl will agree to sort the rejected mail manually at no extra charge.</li> </ul>

## 7.4 Post presentation

Issue	Resultant and corrective actions where applicable
The customer hands over mailing items in poor condition	<ul style="list-style-type: none"> <li>• Whistl staff will visually check the condition of the trays of mailing items upon handover. Any posting/ mailing or relevant segment of the mailing obviously damaged or in a generally poor condition will not be accepted by Whistl.</li> <li>• Any mailing items that Whistl employees subsequently discover (prior to acceptance) to be damaged or in generally poor condition will not be processed. Whistl will contact the customer's nominated contact and the customer may collect the mailing items.</li> </ul>

<p>The customer hands over mailing items that are stuck together</p>	<ul style="list-style-type: none"> <li>If mailing items within a mailing or relevant segment of the mailing are stuck together then the mailing or relevant segment of the mailing will not be processed and Whistl will contact the customer. Where Whistl agrees that it is practicable to separate the mailing items, Whistl will do so.</li> </ul> <p>If, in the opinion of Whistl, the mailing items cannot be separated without damaging the mailing items then the customer must collect the mailing items.</p>
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#### 7.4 Unloading and handover at customer premises

- Separate mailings must be unloaded into separate containers which will facilitate the revenue protection checks against each mailing
- Customers provided with Whistl containers are responsible for loading and unloading the containers when and where directed by the Whistl driver
- All mailings handed over to a Whistl driver must be accompanied by a collection receipt.
- At handover, the Whistl employee will sign, time and date both copies of the collection receipt. Whistl and the customer's driver will each retain one copy of the collection receipt

#### 7.5 Contingency

In the event of customer premises being inaccessible for any reason, the customer must notify Whistl Customer Services of any alternative arrangements and any subsequent change to normal practice at the earliest opportunity.

#### 7.6 Non-machineable or non-routable mail

Non-machineable or non-routable mail includes mail for addresses outside the UK, for BFPO addresses, without a full address, or does not comply with, or is not presented in accordance with the specification outlined in the PremierSort Customer Guide. Mail classified as non-machineable or non-routable will be defaulted to Whistl AllSort wherever possible if Whistl so elects. In this case the customer shall pay the current Whistl AllSort rates and handling charge.

If Whistl cannot, or elects not to, process the non-machineable mail, then the items will be returned to the customer at such time as Whistl may elect.

This is likely to be at the same time as a future collection from the customer.

# 8.0 Data Protection

## 8.1 Data Processing carried out by Whistl

This section relates to the parties obligations under Data Protection Legislation which means all applicable data protection and privacy legislation in force from time to time in the UK including the Data Protection Act 2018 and the Privacy and Electronic Communications Regulations 2003 as amended and any other laws, regulations and secondary legislation, as amended or updated from time to time, in the UK.

The following table sets out the personal data that Whistl processes when providing delivery services for the Customer:

<b>Data subjects</b>	Recipients of the Customer’s mail items.
<b>Categories of Data</b>	Data subject’s name and address as printed on the front of the mail item.
<b>Processing Operations / Subject Matter</b>	<p>The processing operations are as follows (further detail is set out in this table):</p> <ul style="list-style-type: none"> <li>• Recording</li> <li>• Storage</li> <li>• Retrieval</li> <li>• Use</li> <li>• Disclosure by transmission</li> <li>• Erasure</li> </ul>
<b>Purpose</b>	<p>Whistl processes personal data for the following purposes:</p> <ul style="list-style-type: none"> <li>• address read manually or by sortation machine in order to sort the mail to the correct geographical location</li> <li>• Image of the front of the item is recorded, stored using a 3rd-party application, and retrieved to assist with delivery and invoicing queries</li> <li>• where the video encoding service is used an image of the name and address on the front of an unsorted item is recorded and transmitted to our third party processors to be read</li> </ul>
<b>Duration</b>	<p>The duration of the processing is as follows:</p> <ul style="list-style-type: none"> <li>• machine-processing for sortation takes less than 2 seconds</li> <li>• manual processing for sortation takes less than 1 day</li> <li>• images of the front of the envelope are stored for 90 days</li> <li>• video encoded images are accessed for less than 5 minutes</li> </ul>
<b>Deletion of Processed Data</b>	At the end of these periods, the personal data is automatically deleted.
<b>Third party processors</b>	Whistl uses third party processors to store envelope images and also in relation to the video encoding service. Details of the third party processors and their activities is set out below.

## 8.2 Third Party Processors

Where the video encoding service is used, Whistl uses the following third parties to carry on processing on its behalf:

<b>Name of third party processor</b>	PostNL Data Solutions BV	Straive	Prime Vision BV
<b>Location</b>	Netherlands	Philippines & Vietnam	Netherlands
<b>Categories of data processed</b>	An image of the name and address on the front of unsorted items which cannot be machine-read.	An image of the name and address on the front of unsorted items which cannot be machine-read.	An image of the name and address on the front of unsorted items.
<b>Details of processing</b>	PostNL Data Solutions receive the personal data from Whistl into their systems and allow personnel from Straive access to read the personal data.	The image is made available by PostNL Data Solutions to view the address.	Prime Vision provide an application for the storage of images.
<b>Purpose</b>	Receipt of the personal data to be read by personnel from Straive (see below). Image is auto deleted once used.	To manually read addresses which cannot be machine-read. The address is then sent to the Supplier and the image of the Personal Data is deleted.	To assist with delivery and invoicing queries.

## 8.3 How Whistl treats Personal Data

- Both of Whistl and the Customer will comply with all applicable requirements of Data Protection Legislation.
- Although the overall purpose of the data processing described above is agreed with the Customer (to deliver relevant items provided by the Customer to the addressees of each item), Whistl retains control over the manner in which it processes the relevant personal data in order to fulfil the purpose concerned. Accordingly, Whistl will in general be acting as a Data Controller when processing personal data as set out above, in line with the relevant guidance from the Information Commissioner in the UK (<https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/controllers-and-processors/controllers-and-processors/how-do-you-determine-whether-you-are-a-controller-or-processor/#2>).
- The table above sets out the scope, nature and purpose of processing, the duration of the processing and the types of personal data and categories of data subject which are subject to processing.
- The Customer confirms that any personal data provided to Whistl by the Customer or on its behalf has been collected and disclosed in accordance with the Data Protection Legislation.
- When using Whistl's services, the Customer will take reasonable steps to ensure that no irrelevant or unnecessary information about individuals is provided to Whistl for or on behalf of the Customer.
- If and to the extent that Whistl processes any personal data on behalf of the Customer in connection with the performance by Whistl of its services (in circumstances in which the Customer controls both the purpose and the manner of the processing and the processing is carried out by Whistl solely on behalf of the Customer it will:

- process the personal data only on the written instructions of the Customer unless Whistl is required to process it for other purposes by any laws of the European Union which are applicable to the services to process. Whistl will give the Customer notice of that requirement unless it is required not to do so;
- maintain appropriate physical, technical and organisational measures, to protect against unauthorised or unlawful processing of personal data and against accidental loss or destruction of, or damage to, personal data, appropriate to the harm that might result from the unauthorised or unlawful processing or accidental loss, destruction or damage and the nature of the data to be protected, having regard to the state of technological development and the cost of implementing any measures;
- ensure that all personnel who have access to and/or process personal data are obliged to keep the personal data confidential;
- transfer personal data outside of the European Economic Area only where:
  - appropriate safeguards in relation to the transfer are in place;
  - the data subject has enforceable rights and effective legal remedies;
  - Whistl complies with its obligations under the Data Protection Legislation by providing an adequate level of protection to any personal data that is transferred; and
  - Whistl complies with reasonable instructions notified to it in advance by the Customer with respect to the processing of the personal data;
- assist the Customer, at the Customer's cost, in responding to any request from a data subject and in ensuring compliance with its obligations under the Data Protection Legislation with respect to security, breach notifications, impact assessments and consultations with supervisory authorities or regulators;
- notify the Customer within 24 hours on becoming aware of a personal data breach;
- at the written direction of the Customer, delete or return personal data and any copies to the Customer on termination of the agreement unless required by any applicable laws to store the personal data;
- maintain complete and accurate records and information to demonstrate its compliance with the Data Protection Legislation; and
- The Customer generally authorises Whistl to engage processors to process personal data. A list of the processors is set out in the section above. This list will be updated by Whistl and Whistl will give the Customer notice of any proposed change. If the Customer reasonably objects to a change, Whistl may either (at its option): (i) give the Customer an option to pay for the provision of the service without the use of the new processor; or (ii) terminate the provision of the affected service..

Whistl will share the Customer's data with credit reference agencies who may share that data with other organisations to assess credit risk. For more details please see <https://www.experian.co.uk/crain/index.html>

# Appendix A

## Recommended machine-readable fonts

### Things to avoid

Typical problems that can cause your mail to be rejected are as follows:

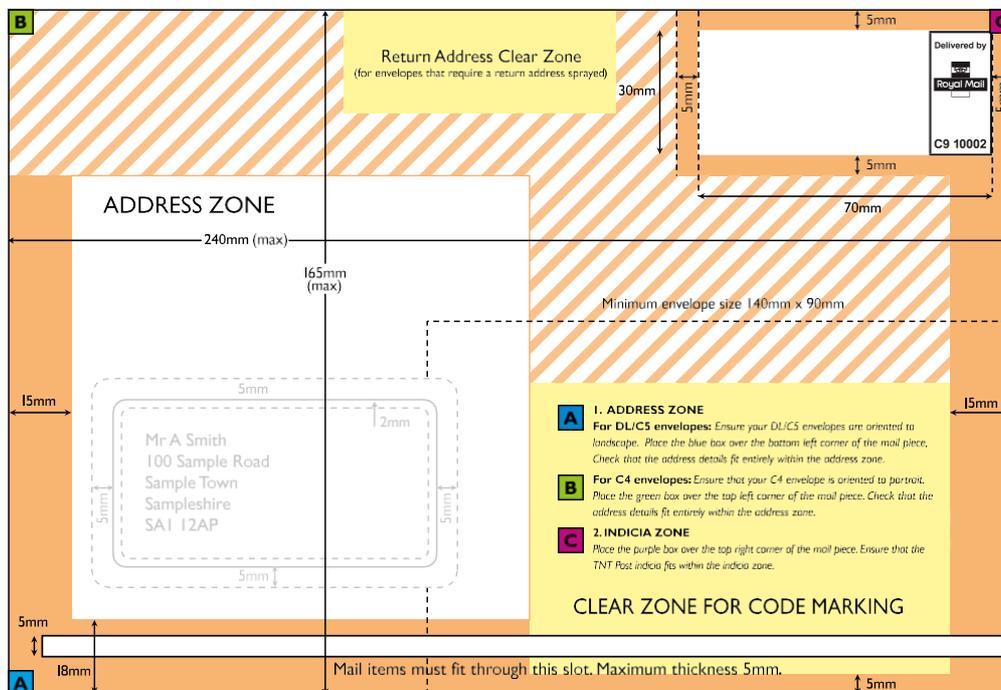
- Characters with incorrect proportions e.g. stretched or condensed typefaces. Over-large or small characters.
- Quality of characters that are poorly printed or defined, either because they have been printed by poor quality printers, low resolution dot matrix printers or because the printer needs maintenance
  - worn ribbon, low on toner etc.

Note: 10 point fonts read consistently better than 12 point fonts. A 12 point in one font may be smaller or larger than a 12 point in another font.

Font	Size
Arial	10pt
Capelli-Plain	10pt
Century-WP	10pt
Classic Typewriter-Plain	10pt
Corporate Mono-Plain	10pt
Courier	10pt
	12pt
Courier New (TT)	10pt
	12pt
Draft Plate-Plain	10pt
Dutch SWA	10pt
Helvetica	10pt
Letter Gothic Plain	10pt
	12pt
Microscan-A	10pt
Microscan-B	10pt
	12pt
New Century Schoolbook	10pt
Palatino	10pt
Pica Plain	10pt
	12pt
Prestige Plain	10pt
	12pt
Souvienne-Plain	10pt
Swiss SWA	10pt
Times Roman	10pt
Weissach-Plain	10pt

# Appendix B

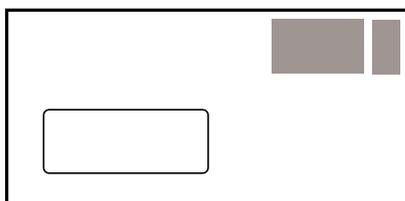
## Envelope specification



Please note the diagram above is not to scale. The measurements above apply to DL and C5 envelopes.

- The address must appear in the address zone and be at least 15mm from any edge and 15mm away from logo/design
- Leave clear a zone 18mm from the bottom edge, and 115mm from the right edge
- Leave clear a zone 115mm from the right edge and 5mm high, with its top edge 70mm from the bottom edge
- The yellow clear zones must be kept clear for code marking and printing return addresses if required
- For DL and C5 envelopes the address should appear on its long edge

E.g.



**Note:** customers that require a customer barcode to be printed should refer to the Whistl Premier Guide Appendix G for the CBC Envelope Specification.

# Whistl FirstSort Customer Guide Version Control

## Document history

Date	Version No.	Section Revised	Revision Summary
19/03/2020	All	All	Due to changes to our brand design, the changes made were for design purposes only.
05/02/2021	1.1	1.0 Service Overview 8.0 Data Protection	<ul style="list-style-type: none"><li>• Removal of Next Day and changes to service summary and force majeure events</li><li>• Updates made to Data Protection</li></ul>
21/11/2022	1.2	Last page	<ul style="list-style-type: none"><li>• New HQ address change</li></ul>
26/07/2023	1.3	8.0 Data Protection	<ul style="list-style-type: none"><li>• Updated throughout 8.1, 8.2 and 8.3</li></ul>
23/01/2024	1.4	All	Design Changes

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