

HOW TO SCREEN A FILE

A step by step example of how to login, upload a file, screen and download yourresults.

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TPS Services

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TPS Checker

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*Calls cost 5p per minute plus your phone company's access charge.



This is a step by step guide on how to:

J Login to your TPS Services account J Upload a file of data J Screen your data J Download your results

We aim to make this guide as simple and self-explanatory as possible. If you don't understand something, please contact one of our team on *Live Chat* on <u>www.tpsservices.co.uk</u>, contact us on 0343 005 9576 or via the contact form on our website.

Any feedback on this guide is always welcome.

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A guide on how to screen data against the Telephone Preference Service (TPS)

1. Go to <u>www.tpsservices.co.uk</u>



2. Log in to your account

Send to a friend Bign up for a FREE TRIAL					a s	Sign up	🖲 Login
Bervices	HOME PRICING	BUSINESSES +	CONSUMERS -	Call us t NEWS	oday on: FAQ		05 9576 ACT US
Login				6		Ŝ.	ž

We're glad to see you return! Please log in to continue.	Don't have an account?				
Email:	By creating an account with us, you will have the ability to upload, screen and download your data. You also have				
Password:	the ability to manage your own DNC lists and purchase any additional credits.				
Forgot your password? Reset it here.	SIGN UP HERE				
LOGIN					
Home Pricing My Account FAQ Terms	of Use Privacy Policy Cookie Policy Contact Us				

If you don't have an account you can create one for free by visiting:

https://www.tpsservices.co.uk/signup.aspx

3. Once you're logged in, you will see your username and the amount of credits you have on your account.





Click on CHECK LIST item on the menu and then click ADD NEW LIST

➡ Services				Credits Remaining: 978 - Add Credits	& Richard Kane 👻
og Dashboard					
😂 Check Lists	New List				
⊘ Check Number NEW					
Q. Search History	Create New List				
Ø DNC Lists	Stage 1 of 5				
Overdue Lists	This process will take you t		ur file and screen it against any combi	nation of the	
) Add Credits	TPS, CTPS, FPS or your own				
£ Pricing		cription to help make identificati	ion easier.		
🔠 My Profile	Short Name	50 chars max			
🝽 Help Videos	Description				
Suggestion Box				. ál	
	• Please note:			Next	
		I remain available for a period of or the date you last screened it. our profile settings.			
				Offline	^

5. Enter a short name for your file and a longer

description if you wish



Click **NEXT**

6. Now you need to tell us what type of file you will be uploading.



You can upload:

) Text files such as .TXT or .CSV

-) Microsoft Excel Files in both XLS and
- XLSX formats
-) Excel files with passwords

7. In this example, we will select an XLS file



8. You now need to tell us if your file has 'Headers' in it. Headers are column headings like this:

Pas	te	5 Cut 5 Copy - 6 Format Pai pboard	Calib nter B		- 11 - A A A - A Font			er + 😨 + % !		Conditional Formatting •	and the second se	
J2			• :)	K 🗸	fx 020726755	55						
	A	В	С	D	E	F	G	н	1	J	к	
1	Title	Firstname	Surname	House	Address1	Address2	Town	County	Postcode	Telephone	TelephoneMobile	
2	Mr	Mukund	Smith	16	Exeter Road		LONDON		NW53HN	02072675555		
3	Mr	Murtaza	Doe	99	St Johns Road	Godshill	NORTH YOOD	Middx	HA63DY	01923866666		
4	Mr	Gary	Garde	9	Camberwell Street		SHEFFIE	South Yorkshire	S362RF		074155000	
5	Mrs	Christine	Roof	81	Menston Drive	Leavesden	BRAINT	Essex	CM75LD	01376141444		
5	Mr	Phillip	Lane	7	Cranbrook Road		LONDON		N179PH		07940123456	
7	Mrs	Kathleen	Apple	1	Mortimer Close		PORTSMOU	Hampshire	PO28EZ	02392929292		
3	Mrs	Michelle	Orange	104	Shakespeare Road	Nether Langwith	WIGSTON	Leicestershire	LE182HJ	01234567890		
9	Mr	Alan	Apple	115	St Georges Road	Breaston	NORTH WALS AM	Norfolk	NR289UT	01692888888		-
0	Mrs	Christine	Wall	3	Tentelow Lane		BRAINTREE	Essex	CM75LD	01376987654		1
1	Miss	Gelina	Doornie	11	Pentland Terrace	Glenfield	GREENFORD	Middlesex	UB68RL		07427987654	
2												1
3					1			6				
4												

So our example file <u>does</u> have headers so we will select 'Yes'. If your file doesn't have headers. Select 'No' and we will simply refer to the columns of data as Column1, Column2 and so on instead of by their names.

Now Click **SELECT FILE** and browse to the location of the file you wish to upload and click **OPEN**.

Image: Bervices →			Credits Remaining: 978 - Add Credits	👗 Richard Kane 👻
🕫 Dashboard				
🕞 Check Lists	New List - TEST	LIST		
Check Number (NEW)				
Q. Search History	Create New List			
Ø DNC Lists	Stage 2 of 5			
Overdue Lists	Stage 2 of 5 Please select the file type	you would like to upload.		
)먥 Add Credits	You can upload files from	Microsoft Excel (XLS or XLSX), text (TXT) or comma separa	ted values (CSV).	
£ Pricing				
📰 My Profile	File Type	Microsoft Excel (*.xls, *.xlsx)	×	
Help Videos	File Has Headers	Yes	~	
Suggestion Box	Select File	Select File		
	Sample Address.xisx (10)	KB) - Click Next to Start Upload		
	Back		Next	
	Back		Next	

Once your file is selected it's ready to upload, click **NEXT**.

9. Once you click NEXT your file will upload.



The status bar will show you how much of the file has been uploaded so far.

10. You now need to tell us which columns in your file contain the telephone numbers you wish to screen. You do this by ticking the boxes under the 'Telephone' column to indicate to us that this field contains telephone numbers.

Dashboard					
Check Lists	Please tell us which columns contain	the telephone and fax numbe	rs that you wan	t us to screen.	
Check Number	Column Header	Import	1	1	
Search History		Deselect All	Telephone Select All	Fax Select All	
ONC Lists					
	Title				
Overdue Lists	Firstname				
Add Credits	Surname				
Pricing	House				
My Profile	Address1				
	Address2				
Help Videos	Town				
Suggestion Box	County				
	Postcode		5		
	Telephone				
	TelephoneMobile				
			\sim		
	Back			Next	

You can also select to not import all the columns in your data file if you wish. By default, we import all columns, but you can tailor this to your specification by de-selecting columns you do not wish to import.

C Dashboard Check Lists Check Number NEW Q Search History ODNC Lists	Please tell us which columns contain t	he telephone and fax number			
 Check Number NEW Search History DNC Lists 	Please tell us which columns contain th	he telephone and fax number			
Q Search History Ø DNC Lists			rs that you war	nt us to screen.	
Ø DNC Lists	Column Header	Import	1	L.	
		Deselect All	Telephone Select All	Fax Select All	
	Title				
O Overdue Lists	Firstname				
🔋 Add Credits	Surname				
£ Pricing	House				
🔠 My Profile	Address1				
	Address2				
🛤 Help Videos	Town				
Suggestion Box	County				
	Postcode				
	Telephone		Ø		
	TelephoneMobile				
				Concession in the	
	Back			Next	
				Offline	

When you're ready, click **NEXT**.

11. We will now show you a summary before importing your file. You will see the file name, description, the columns being imported and the columns that contain telephone numbers as indicated by you.



When you're ready, click **NEXT**.

12. During the import, the status bar will show you how much of the file has been imported so far.



13. Now your file is imported, select what

registers you wish to screen the file against.



Consumers – Select TPS only

Businesses (only Ltd or Plc's) – select CTPS only

All Businesses including sole traders and partnerships – select both TPS and CTPS

In this example, we will select only TPS as we are screening against consumers only.

➡ Services	e.		Credits Remaining: 978 - Add Credi	s 🔒 Richard Kane 👻
🕫 Dashboard				
🖻 Check Lists	🗸 Che	eck List - TEST LIST		
⊘ Check Number NEW				
Q Search History	Check	your overdue Lists		
Ø DNC Lists	Plea	se select which List you would like to check against	and click Next.	
○ Overdue Lists	Please	Note: 1 credit = 1 number checked against either the TPS, CTPS or FPS r tagged as Telephone numbers against the TPS and/or CTPS and columns	egisters. If selected, our system will only screen columns	
'문 Add Credits	youve			
£ Pricing		Suppression Lists TPS - Telephone Preference Service List	Quantity 20,265,978	
🔠 My Profile		CTPS - Corporate Preference Service List	2,244,072	
Help Videos	C		Next	
Suggestion Box				
			Offline	~

Click **NEXT**.

14. You will now see a summary of what credits you require and the cost to screen your file. If you have credits already on account, we will use these first.

Image: Bervices ■			Cred	iits Remaining: 978 - Add Credits	& Richard Kane
% Dashboard					
🔁 Check Lists	Check List - TEST LIST				
Check Number NEW					
Q. Search History	Check your overdue Lists				
Ø DNC Lists	Please check the details below are correct and c	lick continue.			
Ø Overdue Lists	Description		Quantity	Credits	
몇 Add Credits	TEST LIST to be checked against TPS		10	10	
£ Pricing		Credits R	equired	10	
🗉 My Profile		Credits A	vailable	978	
🖬 Help Videos		Credits to	o be Purchased	0	
Suggestion Box		Total Ex	VAT	£0.00	
		VAT		£0.00	
		Total Inc	VAT	£0.00	
			6		
				Continue	
				Offline	~

In this case, we have enough credits on our account so we will use these.

Click **CONTINUE**.

Please note, even if your file is small, there is a minimum charge of £4.25 + VAT for every file.

Foreign companies – if you are based outside the UK and your pricing is showing VAT, please talk to a member of our team and we will adjust your account if you qualify for zero rated supplies.

$15. \ \text{We will now confirm your details and ask}$

you to agree to the terms and conditions.

		Credits Remaining: 978 - Add Credits	Richard Kane -
Personal Details			
Title	Mr 👻		
First name	Richard		
Surname	Kane		
Telephone	084300059302		
Email	richard@tpsservices.co.uk		
Company Details			
company becaus			
Company			
Address 1	Unit A, 5 Colville Road		
Address 2	Acton		
Address 3			
Town	LONDON		
County			
Postcode	W3 8BL		
Country			
	antea neguoni		
Company keg Number			
	\sim		
Back	By submitting this order form, you incate your	Next	
	agreement to our Terms and Collisions	Collins	~
	Title First name Surname Telephone Email Company DetailS Company DetailS Company Address 1 Address 2 Address 3 Town Country Postcode Country VAT Number Company Reg Number	Title Bisst name Bisst name <tr< th=""><th>Personal Details Title Mit mit Survame Rine Survame Rine OthersBits Company Details Company Resource Visit Munder Visit Munder Visit Number Visit Number</th></tr<>	Personal Details Title Mit mit Survame Rine Survame Rine OthersBits Company Details Company Resource Visit Munder Visit Munder Visit Number Visit Number

Tick the Terms and Conditions box and click **NEXT**.

16. If you don't have enough credits on your account, the next screen you'll see will be the payment screen



You can opt to pay by invoice, PayPal or Debit / Credit card.

Please note that if you select to pay by Invoice you'll receive an email with a pro-forma invoice. Once payment is received we'll add your credits (usually within a few hours).

17. If you choose PayPal or Debit/Credit card.



Log in to PayPal

richard@tpsser	vices.co.uk	
Password		
	in for faster checkout ? nded on shared devices.	
	Log In	
н	aving trouble logging in?	
	or	
Pay	by Debit or Credit Card	

Cancel and return to I Want That Ltd

You can log in and pay by PayPal or select pay by Credit/Debit Card. You don't need a PayPal account to pay by Debit/Credit card. **18**. Once you click the PAY NOW button your screen will automatically return to our TPS Services account and screening will commence. It usually takes only a few seconds and you'll then see the results screen.

Services							Credits Remaining: 968 - Add Credits	Richard Kane +
of Dashboard	List Details							
Check Lists								
Check Number	List Overview				Download	Original File Edit Ust	Delete List	
Q. Search History	Last Checked	11/06/2018						
Ø DNC Lists	Next Check	Check in 28 Day(s)						
Overdue Lists	Original Filename	Sample åddress visv						
💓 Add Credits								
£ Pricing	Name	TEST LIST						
🖭 My Profile	Description	Sample test list to check						
IN Help Videos								
Suggestion Box	Record Count	10						
	Valid Telephone Numbers	10	Valid Fax Nur	mbers	o			
	Invalid Telephone Numbers 0	0	Invalid Fax N	umbers	0			
	Empty Telephone Numbers	10	Empty Fax No	umbers	0			
	Check History Below are the checks you have run in th Please note: You are required to recheck your Date Checked		Checked	Removed	Remaining			
	11/06/2018 05:09		10	1	9	Download I	Tesulta	
	Today Breakdown							
	TPS			1				
	Check List Now							
	Fields Imported	NT 22257 10.15	2.00				Offline	~

19. Finally click the download button to download your results.

Services 🕫	Credits Remaining: 968 - Add Credits Alchard Kane
of Dashboard	
🖻 Check Lists	Record Count 10
Check Number	Valid Telephone 10 Valid Fax Numbers 0 Numbers
Q Search History	Invalid Telephone 0 Invalid Fax Numbers 0 0
Ø DNC Lists	Empty Telephone 10 Empty Fax Numbers 0
Overdue Lists	Numbers
₩ Add Credits	
£ Pricing	Check History
🔠 My Profile	Below are the checks you have run in the last 28 days. Please note: You are required to recheck your lists every 28 days.
Help Videos	Date Checked Checked Removed Remaining
Suggestion Box	Date Checked Checked Removed Remaining 11/06/2018 05:09 Today 10 1 0 Breakdown TPS 1 1 0 Check List Now 1 0
	Fields Imported

You have three options at present

- Download your file with numbers tagged this returns your file as you uploaded it with the results appended to each telephone number
- Download your file with numbers removed this option blanks out telephone numbers that were found to be on the TPS
- Download a certificate of Audit a certificate you can use to demonstrate to a client or senior staff member that the screening has in fact been done

Your results are ready!

We chose to download our results with the "Numbers Tagged" which means we get to see the results. Once downloaded, our file looks like this:

н	1	J	K	L	M	N	0
County	Postcode	Telephone	TelephoneResult	TelephoneRegisteredDate	TelephoneMobile	TelephoneMobileResult	TelephoneMobileRegisteredDate
	NW53HN	2072675555	OK			EMPTY	
Middx	HA63DY	1923866666	OK			EMPTY	
South Yorkshire	S362RF		EMPTY		7415500005	OK	
Essex	CM75LD	1376141444	OK			EMPTY	
	N179PH		EMPTY		7940123456	OK	
Hampshire	PO28EZ	2392929292	OK			EMPTY	
Leicestershire	LE182HJ	1234567890	TPS	before 03/07/2012		EMPTY	
Norfolk	NR289UT	1692888888	OK			EMPTY	
Essex	CM75LD	1376987654	OK			EMPTY	
Middlesex	UB68RL		EMPTY		7427987654	ОК	
Colum	ns in	serted	showing	RESULT and t	he DATE o	f registration	if we know it.

Please note: Files are downloaded in a zip format which normal windows should be able to open. If not, visit <u>www.winzip.com</u> and download it for free.