

HOW TO SCREN

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

TEL: 0343 005 9576

TPS Services

Telephone: 0343 005 9576 Fax: 0844 774 8411 www.tpsservices.co.uk

TPS Checker

Telephone: 0844 774 8410* Fax: 0844 774 8411 www.tpschecker.co.uk I Want That Ltd Unit A, 5 Colville Road Acton, London, W3 8BL

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This is a step by step guide on how to:

Login to your TPS Services accountUpload a file of dataScreen your dataDownload 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 www.tpsservices.co.uk, contact us on 0343 005 9576 or via the contact form on our website.

Any feedback on this guide is always welcome.

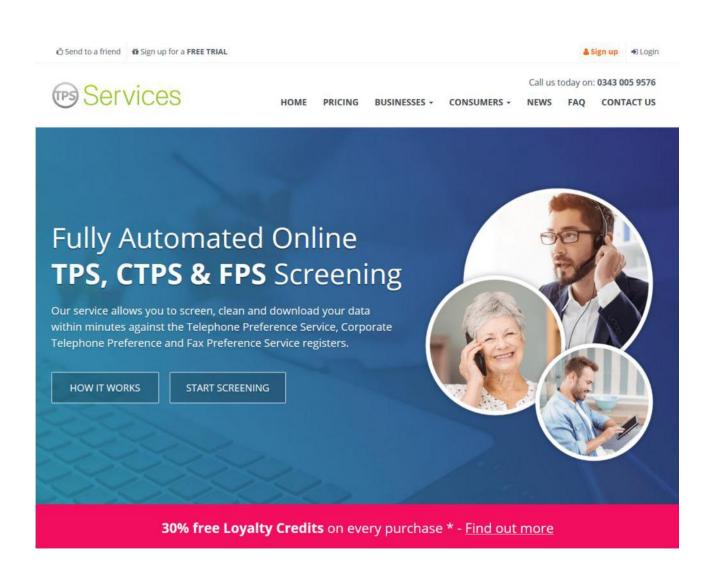
TPS Services
Unit A, 5 Colville Road
Acton
London
W3 8BL

www.tpsservices.co.uk

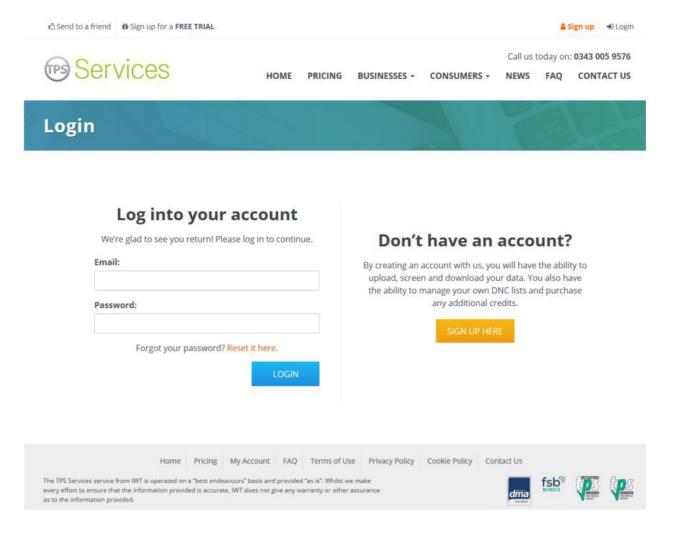
Tel: 0343 005 9576

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

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



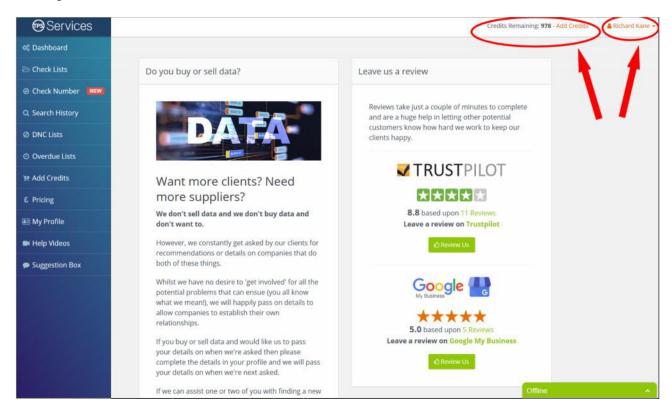
2. Log in to your account



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

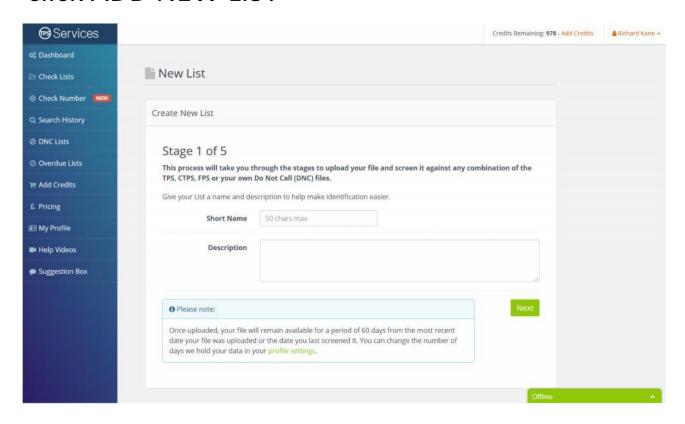
https://www.tpsservices.co.uk/signup.aspx

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

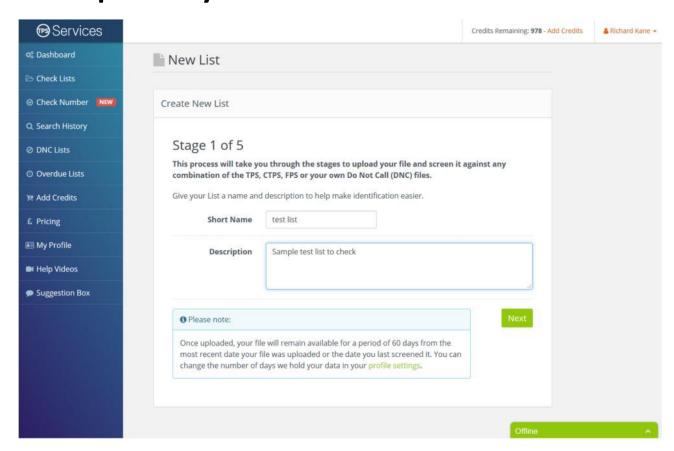


4. Upload your file

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

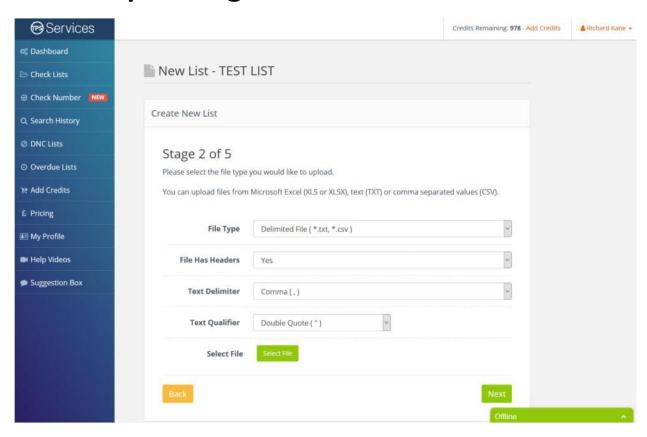


5. Enter a short name for your file and a longer description if you wish



Click **NEXT**

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



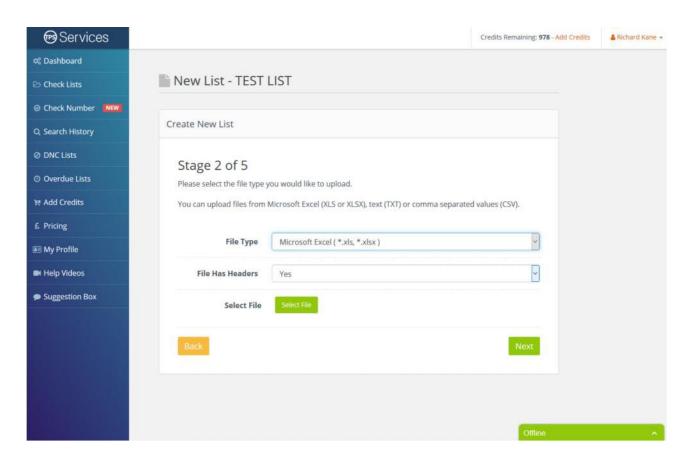
You can upload:

Text files such as .TXT or .CSV

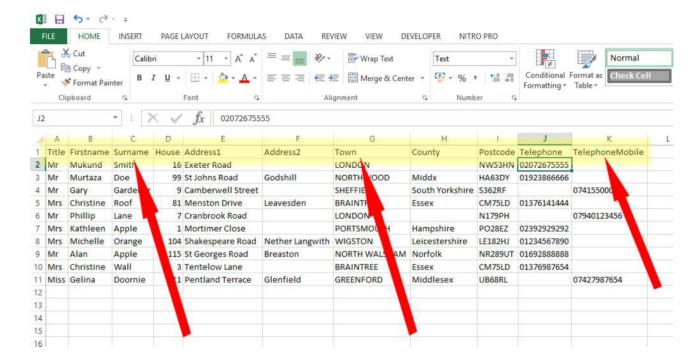
Microsoft Excel Files in both XLS and XLSX formats

Excel files with passwords

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

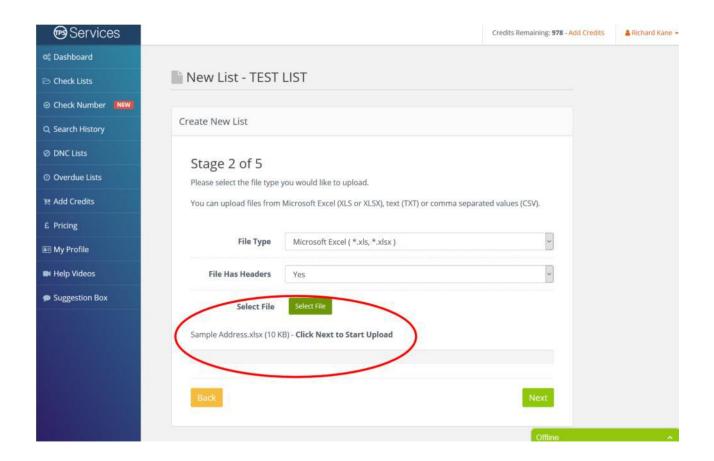


8. You now need to tell us if your file has 'Headers' in it. Headers are column headings like this:



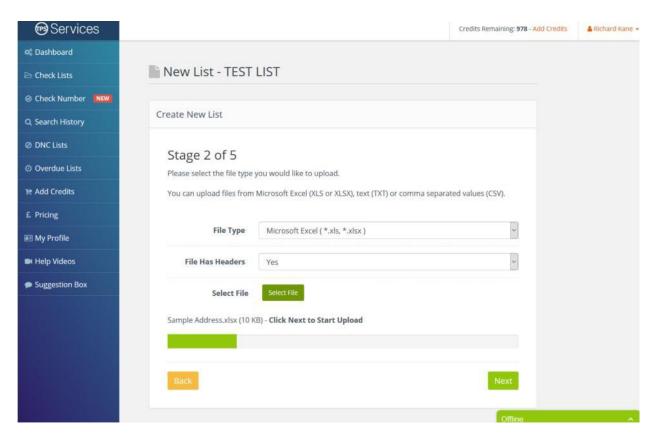
So our example file <u>does</u> have headers so we will select 'Yes'. If your file doesn't have headers. Select 'No' and we will simply refer to the columns of data as Column1, Column2 and so on instead of by their names.

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



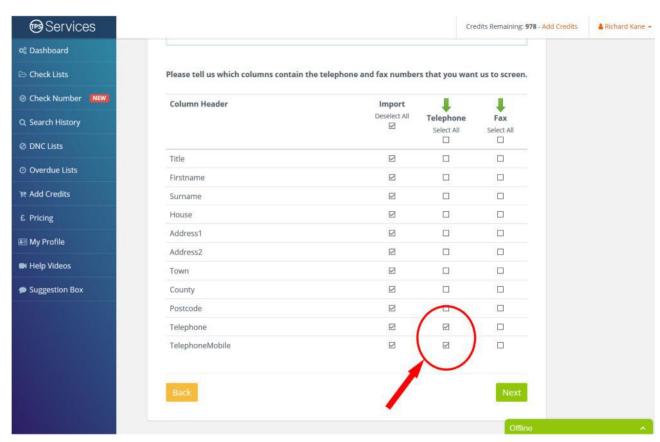
Once your file is selected it's ready to upload, click **NEXT**.

9. Once you click NEXT your file will upload.

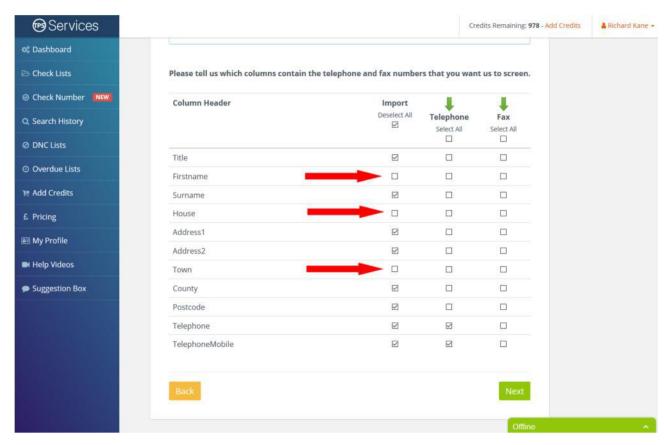


The status bar will show you how much of the file has been uploaded so far.

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.

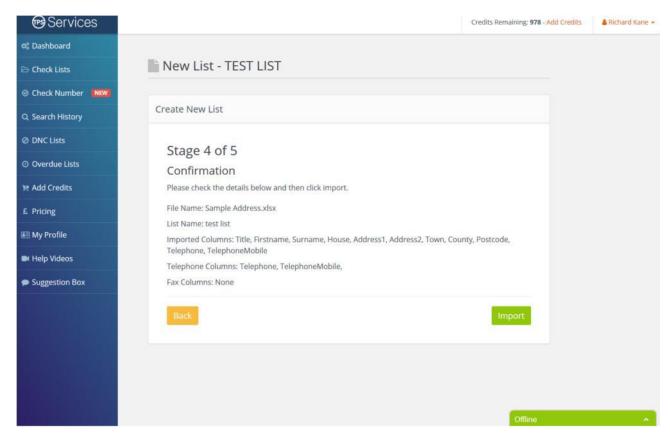


You can also select to not import all the columns in your data file if you wish. By default, we import all columns, but you can tailor this to your specification by de-selecting columns you do not wish to import.



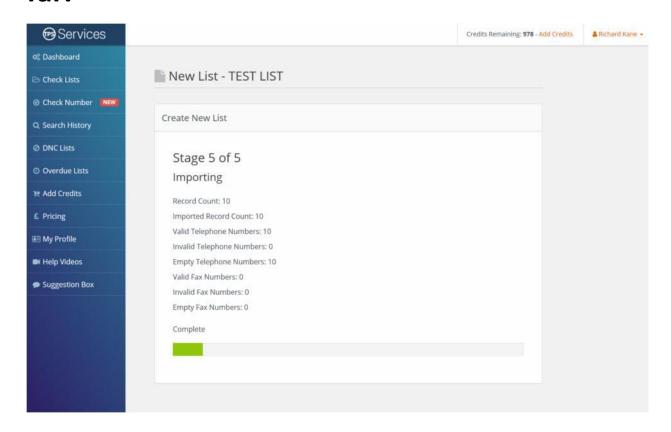
When you're ready, click **NEXT**.

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.

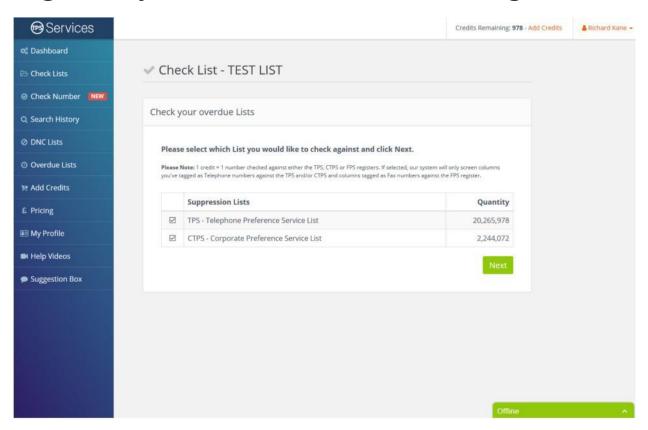


When you're ready, click NEXT.

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.

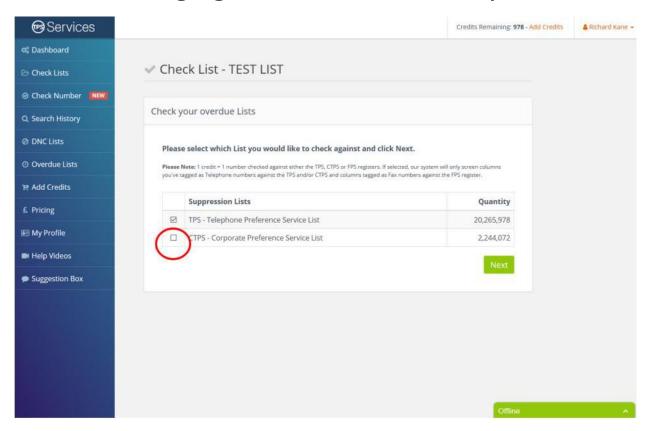


Consumers – Select TPS only

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

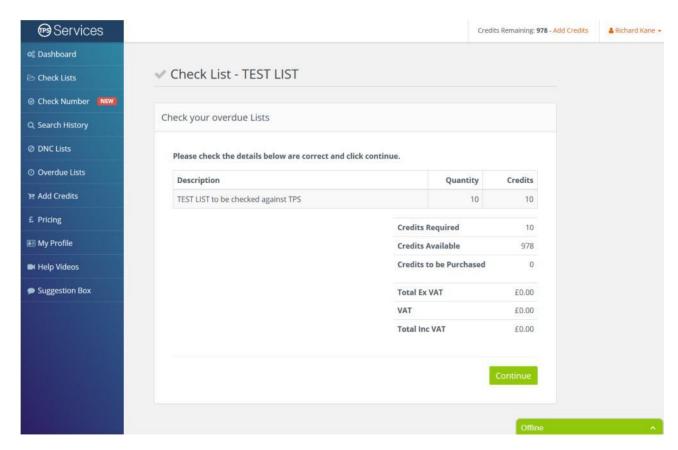
All Businesses including sole traders and partnerships – select both TPS and CTPS

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



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.



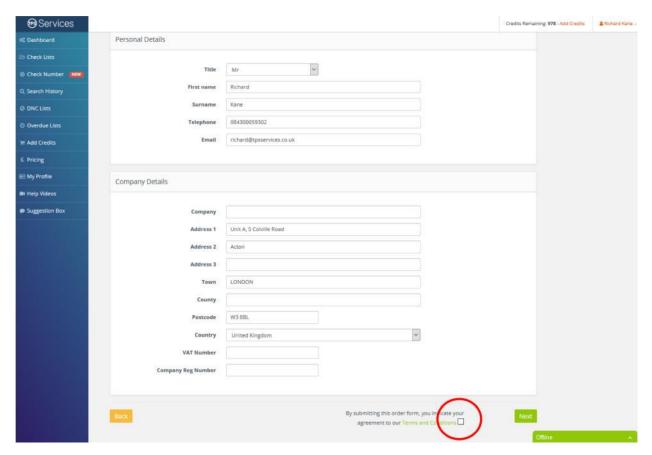
In this case, we have enough credits on our account so we will use these.

Click **CONTINUE**.

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

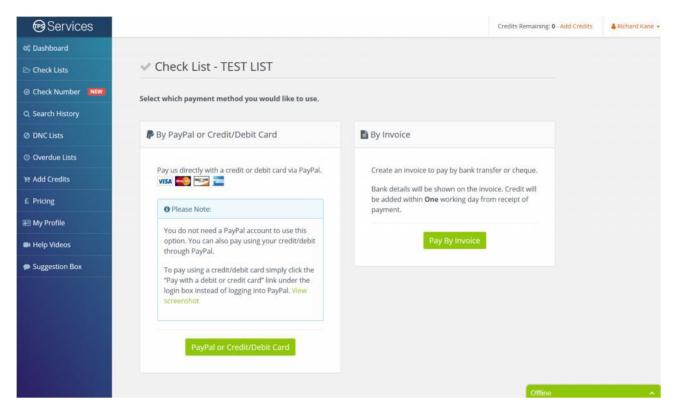
Foreign companies – if you are based outside the UK and your pricing is showing VAT, please talk to a member of our team and we will adjust your account if you qualify for zero rated supplies.

15. We will now confirm your details and ask you to agree to the terms and conditions.



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

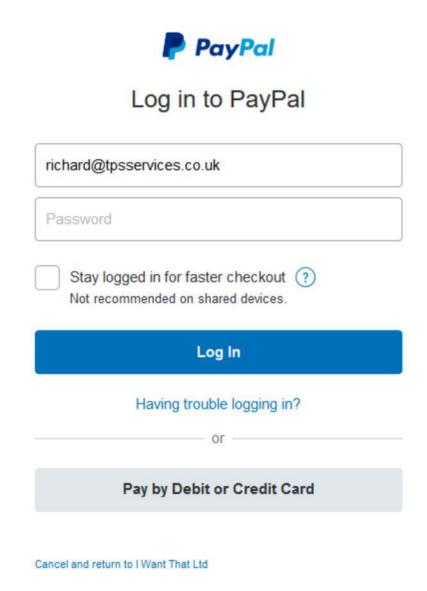
16. If you don't have enough credits on your account, the next screen you'll see will be the payment screen



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

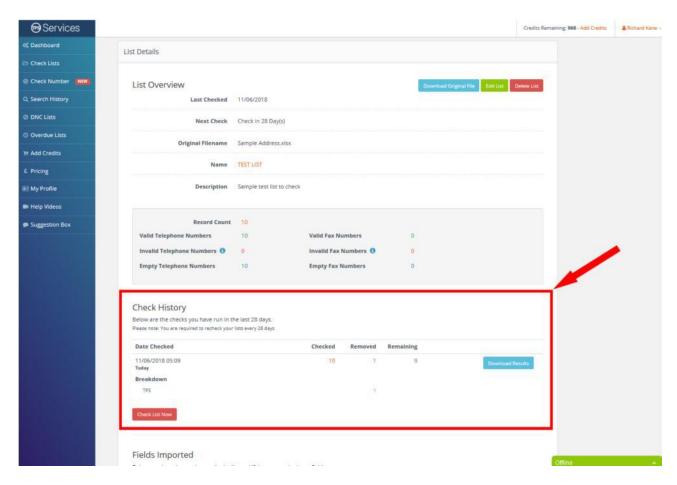
Please note that if you select to pay by Invoice you'll receive an email with a pro-forma invoice. Once payment is received we'll add your credits (usually within a few hours).

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

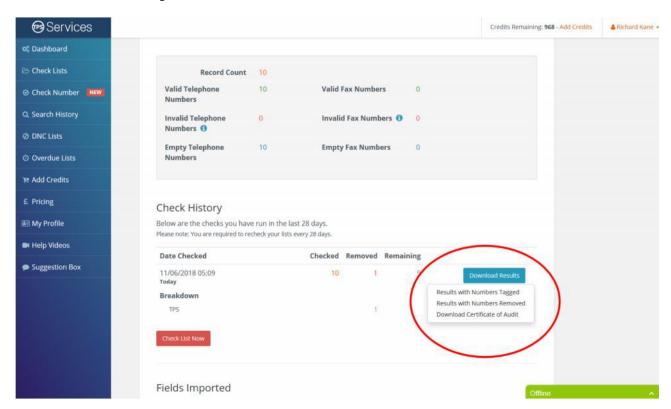


You can log in and pay by PayPal or select pay by Credit/Debit Card. You don't need a PayPal account to pay by Debit/Credit card.

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.



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



You have three options at present

- 1. **Download your file with numbers tagged** this returns your file as you uploaded it with the results appended to each telephone number
- 2. **Download your file with numbers removed** this option blanks out telephone numbers that were found to be on the TPS
- 3. **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:



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