



# Checker

*The free TPS & CTPS screening solution*

# EXCEL ADD-IN FOR TPS CHECKER

(For Windows Only)

**TEL: 0843 005 9576\***

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

## **TPS Services**

Telephone: 0843 005 9576\*

Fax: 0844 774 8411

[www.tpsservices.co.uk](http://www.tpsservices.co.uk)

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

# TPS CHECKER EXCEL ADD-IN

**Important note:** This Add-in is only for use with Microsoft Excel versions 2007, 2010 and 2013. If you are using an older version of Excel please contact us on 0845 005 9576 or on live chat on [www.tpsservices.co.uk](http://www.tpsservices.co.uk) for information about how we can assist you with an Excel solution for your version of Excel.

## ABOUT THIS GUIDE

This guide explains how to install and use the Microsoft Excel Add-in for TPS Checker. Please read it thoroughly.

## WHAT YOU WILL NEED

The installation files come in either a .EXE file or a .ZIP file which can be opened using either of the world's two most popular compression utilities Winzip or Winrar. If you do not have either of these installed already you can download them for free here:

<http://www.winzip.com> or <http://www.rarlab.com>.

## BEFORE YOU START - UNINSTALL ANY OLD VERSIONS OF THE TPS EXCEL ADD-IN

If you have a previous version of the TPS Excel Add-in installed, you will need to uninstall it before installing the new version.

**To uninstall your package follow these instructions:**

### WINDOWS 8

- Click on the start button.
- Select Control Panel. If the Control Panel Icon is not showing on your Home Screen then click the Search tool in the top right and type in Control Panel. You should see the Control Panel option in your search Options.
- Within the Control Panel, select "Programs and Features". Depending on the view options you have set, it may be showing as "Programs - Uninstall a program".
- Scroll down the list of installed programs until you see the program TPS.
- Double Click the TPS program.

- You will be asked “Are you sure you want to uninstall TPS Excel Addin?”.
- Click Yes.

The old version of the TPS Excel Add-in will be removed from the system and you can proceed to install the latest version.

## WINDOWS 7

- Click on the start button.
- Select Control Panel.
- Within the Control Panel, select “Programs and Features”. Depending on the view options you have set, it may be showing as “Programs - Uninstall a program”.
- Scroll down the list of installed programs until you see the program TPS.
- Double Click the TPS program.
- You will be asked “Are you sure you want to uninstall TPS Excel Addin?”.
- Click Yes.

The old version of the TPS Excel Add-in will be removed from the system and you can proceed to install the latest version.

## INSTALLING THE EXCEL ADD-IN

Download the Excel Add-in from here if you have not already done so:

<http://www.tpschecker.co.uk/downloads.aspx>

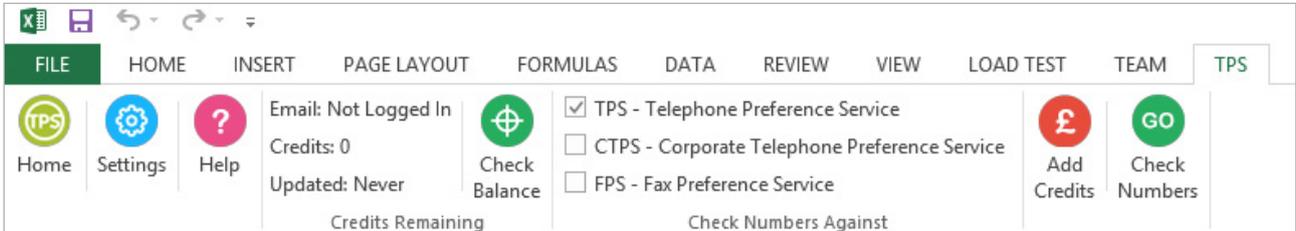
Extract and run the file **tps\_setup.exe**.

Some systems with increased security may be set to prevent you from installing Add-ins and running .EXE files. If your system will not allow you to download the .EXE file, then try downloading the .ZIP file instead.

If you're still having problems contact one of our support team and they will discuss how to get the install file to you by an alternative method such as email or send you a direct link to download it.

# USING THE TPS EXCEL ADD-IN

The Excel Add-in, places an additional menu within your Excel program that looks something like this:



## THE MENU EXPLAINED



Home will take you to the [www.tpschecker.co.uk](http://www.tpschecker.co.uk) website



The settings menu where you can enter your TPS credentials and select your screening options



An online version of this PDF help file



Add Credits will take you straight to your TPS account to add credits

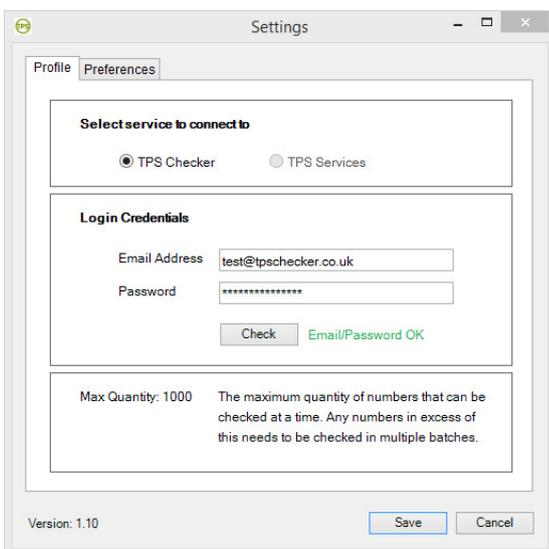


The last date and time your credit balance was checked is shown on the menu, but you can update it at any time clicking the Check Balance button.

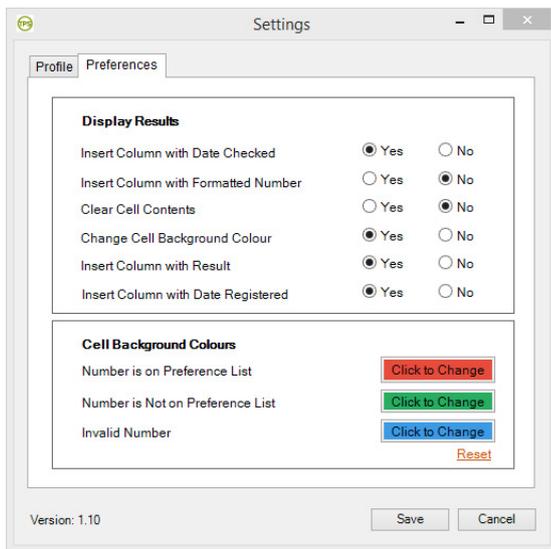


To check numbers against the TPS click the Check Numbers button.

## BEFORE YOU SCREEN



**Step 1** - The first time you use the TPS Add-in, you will need to enter your TPS Checker credentials into the Settings menu so that the Add-in can connect with your online TPS account.



**Step 2** - Within the Settings menu, select the Preferences tab and decide how you want the results of your checks to feed back to you.

You can select:

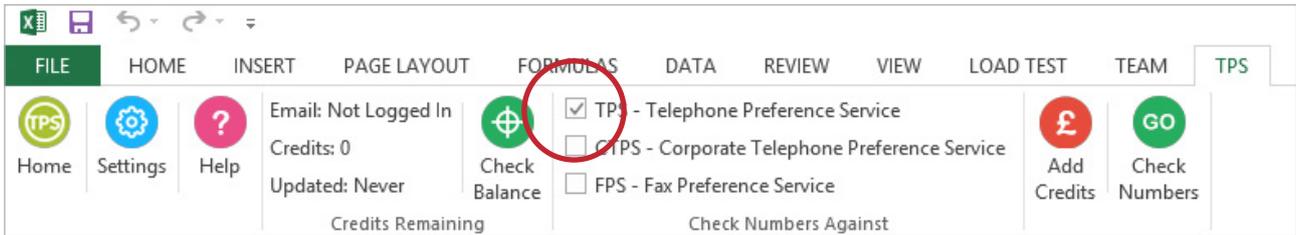
- **Insert Column with Date Checked** - this will insert a column with the date you ran the check.
- **Insert Column with Formatted Number** - this will insert a column showing the telephone number correctly formatted.
- **Clear Cell Contents** - where a number matches one of the selected registers you're screening against, this option will remove the number from your spreadsheet. This can help prevent any accidental calls to numbers registered on the TPS.
- **Change Cell Background Colour** - select this if you would like the results to change the colour of the cells you're checking. You can select the colour scheme in the additional box on the preferences tab.
- **Insert Column with Result** - this will insert a column showing the result, e.g OK or TPS.
- **Insert Column with Date Registered** - this will insert a column showing the date the number was registered on the selected registers e.g. the date the number was registered on the TPS.

You have to select at least one of these methods of reporting before you can screen your data:

- Change Cell Background Colour
- Insert Column with Result

In other words you have to select one option that allows us to return the results to in either a colour or text basis.

**Step 3** - select what register(s) you would like to check your numbers against (TPS, CTPS, FPS) by ticking them on the TPS menu.



	A	B	C	D
1	Firstname	Surname	Telephone	
2	A	Sample	01698292886	
3	A	Sample	7956940166	
4	A	Sample	1132176840	
5	A	Sample	8000217672	
6	A	Sample	1689828026	
7	A	Sample	7974203204	
8	A	Sample	1482702696	
9	A	Sample	1509559931	
10	A	Sample	1133452840	
11	A	Sample	2075025078	
12	A	Sample	1698403994	
13	A	Sample	1926600274	
14	A	Sample	1227456862	

**Step 4** - Highlight the numbers you wish to check and click the CHECK NUMBERS button.

	A	B	C	D	E
1				CheckResult	RegisteredD
2	Firstname	Surname	Telephone		
3	A	Sample	01698292886	TPS	25/05/2015
4	A	Sample	7956940166	TPS	25/05/2015
5	A	Sample	1132176840	TPS	25/05/2015
6	A	Sample	8000217672	TPS	25/05/2015
7	A	Sample	1689828026	OK	
8	A	Sample	7974203204	OK	
9	A	Sample	1482702696	OK	
10	A	Sample	1509559931	OK	
11	A	Sample	1133452840	OK	
12	A	Sample	2075025078	OK	
13	A	Sample	1698403994		
14	A	Sample	1926600274		

Depending on the selections you have made in the settings option your results will look like this:

Numbers on the TPS are shown here in **red** (the colour we chose)

Numbers not on the TPS are shown here in **green** (the colour we chose)

Problem numbers (invalids) are shown in **blue** (the colour we chose)

We also selected to see the results and date registered columns.

## THE RESULTS OF YOUR CHECK

There are three possible results to TPS Check.

- **OK** - means it's not on the selected register(s) and can be called.
- **TPS, CTPS, FPS** - means it appears on that register.
- **INVALID** - we could not find a valid number in the selected cell.

## CALCULATING THE NUMBER OF CREDITS NEEDED

When you highlight numbers to be checked, we will estimate the number of credits required based on whether or not the cells you highlighted have any content or are empty.

When we actually perform the check, any invalid numbers will not be charged for so the actual number of credits will be assessed during the checking process and may be less than estimated.

## SAVING YOUR RESULTS

Please note that if you check numbers on either a .CSV or .TXT file, these file formats do not store formatting information such as colours, so you will need to save your results out as an Excel file before exiting if you want to keep any coloured results you selected.

## GENERAL

There are some limitations to offering this method of TPS screening.

- You can select up to 1,000 numbers at a time to check.
- If you have 1,000 or less numbers to check, you can highlight the entire column as opposed to selecting the numbers themselves.
- If you highlight an entire column of more than 1,000 numbers, we will offer to check the first 1,000 numbers only.
- You can only select one column at a time. If you have numbers in two columns (for example Home Number and Mobile Number), you will need to run the checking process in two parts.

- If you select to insert the results, we will insert the appropriate number of columns to insert the results into and we will also insert a row for the column labels. If you run several checks on the same spreadsheet and we cannot detect the existence of the results columns for one reason or another, we will insert the columns and the row with the labels again.

## TECHNICAL SUPPORT

This Excel Add-in has been extensively tested, but if you experience any problems please contact our support team on either:

**Telephone: 0843 005 9576**

**Email: [support@tpsservices.co.uk](mailto:support@tpsservices.co.uk)**

**Live Chat: [www.tpsservices.co.uk](http://www.tpsservices.co.uk)**