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## **How to pre-register your clients on the PhonepayPlus Registration Scheme using the bulk upload template**

### **What is the bulk upload service?**

To help your clients to register their organisation as early as possible, PhonepayPlus offers a service by which you can pre-register your clients on the registration database. This allows you to give your client a head start in the registration process by completing some basic information on their behalf.

Once you submit the data, PhonepayPlus will upload it to the database and send your clients an e-mail to let them know that all they need to do is log on, verify their details and complete payment or claim an exemption.

### **Who can use this service?**

Any organisation that is registered with PhonepayPlus is able to download the bulk upload spreadsheet template from within their account pages, under the 'Bulk Upload' tab.

At first we will only be able to process those organisations that have 50 or more clients they wish to pre-register.

### **Follow these steps to submit a bulk upload spreadsheet:**

1. Click on the 'Login' button on the PhonepayPlus website homepage ([www.phonepayplus.org.uk](http://www.phonepayplus.org.uk)). You will be taken to the Login page.
2. Fill in your login details (e-mail address and password) to access your account pages.
3. Click on the Bulk Upload tab.
4. Click on the link to download the template spreadsheet (this sits above the tabs on your account pages and says "The bulk upload spreadsheet template can be downloaded here")
5. A pop-up window will open and ask if you want to save or open the document. We recommend you save this document so that you can refer back to it easily and add further data if required.

6. Once the spreadsheet is open, read and follow the instructions within it. These are available under the “README” worksheet tab located at the bottom of the spreadsheet.
7. Populate the spreadsheet with data for your clients. You can do this either by manually entering in the data, or by importing the data from another source, e.g. a spreadsheet/database you already use to keep a list of your clients. (Please remember to thoroughly check the data if you are importing it from another source).
8. Save the completed spreadsheet.
9. Log back in to your account and return to the Bulk Upload tab from your account pages.
10. To send the spreadsheet to PhonepayPlus choose the Browse button available under the Bulk Upload tab and navigate to your completed spreadsheet file.
11. If you wish to add any additional information, such as a contact for queries regarding your submission, use the box provided.
12. When you are ready to submit your spreadsheet click “Send”
13. PhonepayPlus will then deal with your submission. Please note that we reserve the right to refuse to upload data in any of the following circumstances:
  - Any of the mandatory fields are not populated with data
  - Any of the fields are populated with invalid data, e.g. a phone number field contains alpha characters
  - Any field contains more than 250 characters
  - The spreadsheet contains less than 50 records
14. Once PhonepayPlus has uploaded your data, we will send you a successful submission e-mail with details of the upload. Your clients will receive their invitation from us and be able to log in to the website to verify their details and make a payment or claim an exemption.

### **When does the upload take place?**

As some of your clients may have more than one supplier (or may have registered themselves already) we want to avoid sending them confusing emails about their registration status. To avoid any duplication we will operate the bulk upload process through a series of managed gates:

You submit your spreadsheet before this date...	... we will aim to issue the invitation to your clients by this date
17 June	27 June

1 July	11 July
15 July	25 July

This means that if you provide your upload to us before Friday 17 June 2011 we will aim to issue an invitation to your clients no later than Monday 27 June 2011.

Remember, your clients can register at any time on an individual basis – so if they want to take advantage of the lower fee in May and June then they can register without an invitation by simply visiting our Website. Otherwise please instruct your clients to accept the invitation and either claim an exemption or pay the fee as quickly as possible.

If you have any questions, perhaps about Bulk-uploads gates – or maybe the steps necessary to upload a form – please contact our registration helpdesk:

E-mail: [registration@phonepayplus.org.uk](mailto:registration@phonepayplus.org.uk)

Telephone: 0844 264 1222