

Top Producer for Windows Mobile User Guide

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Getting Started

In this chapter:

- *“What is Top Producer for Windows Mobile?” on page 2*
- *“About this Guide” on page 3*
- *“Contacting Technical Support” on page 4*

What is Top Producer for Windows Mobile?

Top Producer for Windows Mobile gives you access to your online Top Producer data any time, anywhere, with the portability of your handheld.

You can store listings, closings, contacts and leads on your handheld. You can also organize follow-up calls, appointments and to-dos with **Today's Activities**.

Synchronization technology ensures that the changes you make on your handheld (e.g. new contacts and new listings) are transferred into your online database after you perform a synchronization, and that changes made to the online database are transferred to the handheld.

About this Guide

This guide is in Portable Document Format (PDF), and is viewed using Adobe® Acrobat® Reader®.

For more information about Adobe Acrobat, please refer to Adobe Acrobat's online Help. (To access the online Help from the main Adobe Acrobat window, click the **Help** menu, then **Reader Help**.)

How to Print the Guide

To print the guide:

- 1 From the **File** menu, click **Print**.
- 2 From the **Print** dialog box, set your printer options.
- 3 Click **OK**.

Navigating Within the Guide

If you are reading the guide online as a PDF file, click any text that appears in blue to jump directly to that section, (for example, click on ["Installing from Top Producer 7i" on page 8](#)).

Contacting Technical Support

Top Producer Technical Support is available Monday to Friday, 6:00 AM to 5:00 PM (Pacific Time):

- **Email:** support@topproducer.com
- **Telephone:** 1-800-830-8300
- **Fax:** 604-270-6365

Before You Start Installing

- *“System Requirements” on page 6*
- *“Checklist for Getting Started” on page 7*

System Requirements

To use Top Producer for Windows Mobile, your computer and handheld need to conform to the following requirements:

Memory

- Minimum 128 MB recommended

Computer operating system

- Windows 2000, XP or Vista

Internet browser

- Internet Explorer 6.0
- Top Producer 8i-related functions require Internet Explorer 7.0 or Firefox 2.0

Synchronization Software

- For Windows operating systems prior to Vista: ActiveSync 4.0 or higher
- For Windows Vista: Windows Mobile Device Center

Handheld operating system

- Windows Mobile 5.0 (Pocket PC and Pocket PC Phone Editions)

Checklist for Getting Started

To set up Top Producer for Windows Mobile, ensure the following:

- That you have a Top Producer for Windows Mobile license.
- ActiveSync is installed on your computer.
- You can synchronize your handheld with ActiveSync.
- The handheld is connected to the USB port on your computer.

Note: For instructions on how to connect your handheld to your computer, refer to the instructions that came with your handheld.

Installing from Top Producer 7i

- *“Step 1 - Assign a License” on page 9*
- *“Step 2 - Set up Filters for Data Sent to the Handheld” on page 11*
- *“Step 3 - Install the Software” on page 12*
- *“Step 4 - Download Data onto your Handheld” on page 14*
- *“Step 5 - Start up Top Producer for Windows Mobile” on page 18*

Step 1 - Assign a License

Follow these steps to make sure that you have been assigned a Top Producer for Windows Mobile license in Top Producer 7i.

To assign a license to an agent:

- 1 From Top Producer 7i's **Setup** menu, click **Agent setup**.

The *Agent information* page opens.

- 2 In the **Additional Top Producer applications** section, select **Top Producer for Windows Mobile**.

The displayed agent now has a Top Producer for Windows Mobile license.

- 3 Click **OK**.

To assign a license to an assistant:

Follow these steps if you purchased more than one license and want to assign a license to an assistant who also has a handheld device.

- 1 From the **Setup** menu in Top Producer 7i, click **Agent setup**.
- 2 From the *Agent information* page, click the **Assistants** action item on the left side of the screen.

The *Assistants* page opens.

Note: If you don't see your assistant's name in the list, you will need to add their information. For more information on creating assistants, see Top Producer 7i Quick Setup.

To purchase an assistant license, contact our Sales Department at 1-800-241-5309.

- 3 Select the assistant and then click the **View or edit** action item.

The *Assistant information* page opens.

- 4 In the **Login information** section, select **Top Producer for Windows Mobile** from the drop-down list and click **OK**.

The displayed assistant now has a Top Producer for Windows Mobile license.

Step 2 - Set up Filters for Data Sent to the Handheld

Set up filters to control which records are sent to your handheld. Doing this will speed-up your handheld's response time and limit the size of your database, making all of your synchronizations faster.

Setting up a Filter

To set up a filter:

- 1 From the Top Producer 7i **Setup** menu, select **Applications setup > Top Producer 7i for handhelds**.
- 2 Click the **Filter** action menu item.
- 3 From the *Filter for current device* screen, define the filter settings you want to use for your device.

For a complete listing of the fields available and how to use them, see the "Setting Up Filters to Control What Data is Sent to the Handheld" topic in the 7i online help.

- 4 By default, contacts and leads are only selected if they meet *all* of the filter conditions. If you have specified more than one filter condition and you want contacts to be selected that meet *any* of the conditions:

- a) Click the **All** link to the right of the **Contacts and Leads** grid.

Note: This option is only available if you have more than one contact/lead filter set up.

- b) From the *Filter group rule* dialog box, select **contact matches at least one condition** and click **OK**.

The **All** link changes to **Any**. Now contacts will be sent to the handheld if they match any one of the specified filter conditions.

- 5 When finished specifying your filter settings, click **OK**.

Step 3 - Install the Software

The following instructions assume you have the minimum system requirements installed. For more information, see [“System Requirements” on page 6](#).

To install Top Producer for Windows Mobile:

- 1 Use the USB slot to connect your device to the computer.
- 2 From the **Setup** menu in Top Producer 7i, select **Applications setup > TOP PRODUCER 7i for handhelds**.

If you have any other mobile licenses, the *Register Device* dialog box opens.

- 3 Select the **Windows Mobile Handheld** radio button and then click **OK**.
- 4 From the *Handheld manager*, select the link to download the Windows Mobile handheld client software.

The *File Download* dialog box appears.

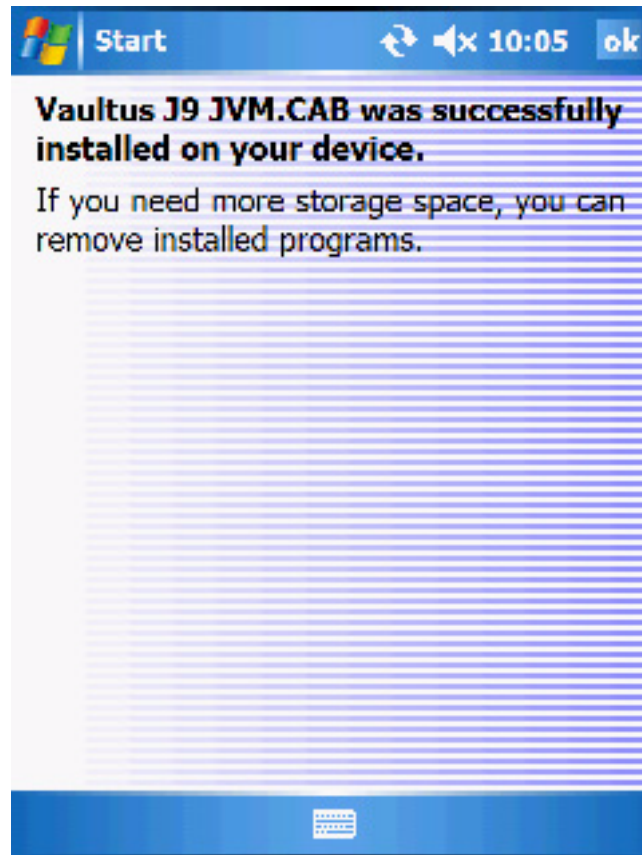
- 5 Click **Run**.
- 6 When the *Security Warning* dialog box appears, click **Run**.
- 7 Follow the on-screen prompts to install the software.
- 8 When the desktop installation is finished, a message will appear stating that the application will be installed on the next device connection. Click **OK**.

Note: If you are using an expansion memory card, you will be asked whether you wish to install to the handheld's base memory or to the expansion card. Only choose the latter if you are using a high-speed expansion card.

Important: You must install all of the files in just one of the two memory locations. If you don't do this - e.g. you install one file in the

handheld's base memory and the other two in the expansion card - Top Producer for Windows Mobile will not run.

- 9 When the handheld installation finishes, the following message appears:



- 10 Click **OK** to continue.

Top Producer for Windows Mobile is now installed on your handheld.

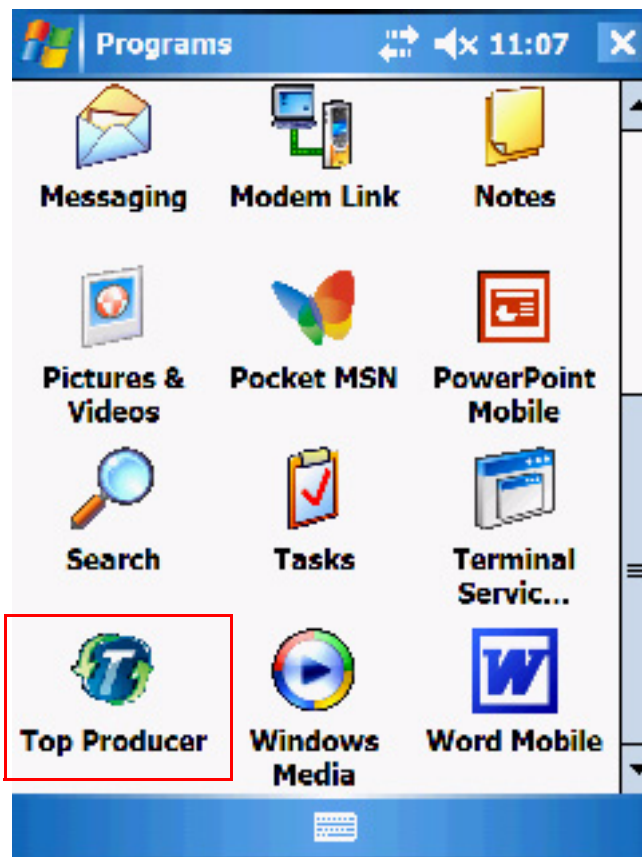
Step 4 - Download Data onto your Handheld

Downloading your Data

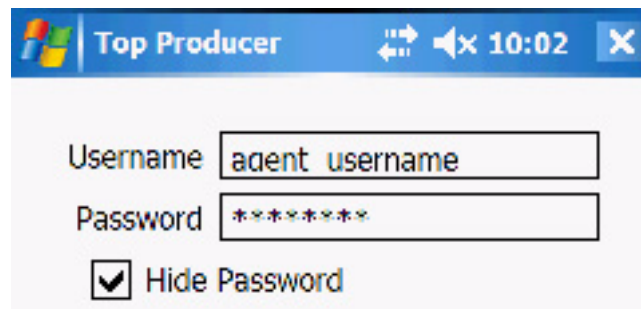
The first time you log onto Top Producer for Windows Mobile you will want to download your Top Producer 7i data onto your handheld.

To download Top Producer 7i data onto your handheld:

- 1 Connect your handheld to your computer via the USB port.
- 2 From the main screen's **Start** menu, select **Programs**. The **Launch Pad** will appear.

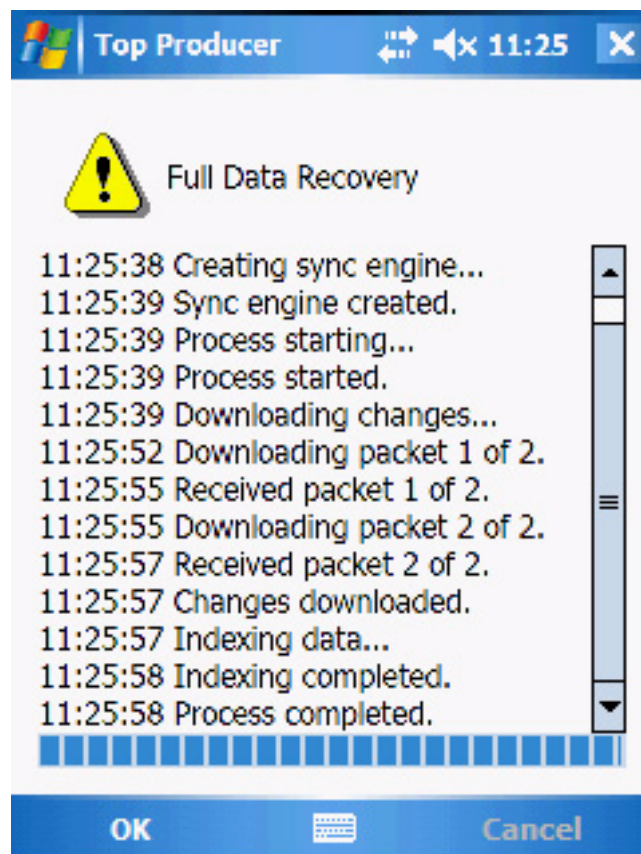


- 3 Tap the Top Producer icon. If this is the first time you've used Top Producer for Windows Mobile, you'll see a message asking you to log into Top Producer 7i to download your data.
- 4 Click **Yes** and the *Login* screen will appear.



- 5 Enter your Top Producer 7i username and password, then click **Connect** at the bottom left.

The message "connecting, please wait" will appear followed by "login successful." The FDR sequence will now proceed, displaying the sequence of messages shown below.



- 6 When this completes, click **OK**. The Top Producer for Windows Mobile screen will open and display your downloaded data.

Note: Depending on the size of your database and the way your filters are configured, FDR can take between 5 minutes to one hour to complete.

A Note for Windows Vista Users

If you are using Windows Vista and the FDR fails, displaying the message **Error 103**, please perform the following:

To redo FDR after receiving Error 103

- 1 From the Vista main screen, go to **Start > Control Panel > Windows Mobile Device Center**.
- 2 Click **Mobile Device Settings** and then **Connections Settings**. The **Connections Settings** screen opens.
- 3 From the **This computer is connected to** drop-down menu, select either **Work Network** or **The Internet**, then press **OK**.
- 4 Confirm that your Windows Mobile device is connected by viewing the bottom left corner of the Windows Mobile Device Center screen and confirming that the Connection status displays **Connected**.
- 5 If your mobile device is connected, restart the FDR process from Step 2 above. If not, contact Top Producer Technical support.

Step 5 - Start up Top Producer for Windows Mobile

The previous sections describe the steps needed for the first time you use Top Producer for Windows Mobile. The following steps describes how to start up the program after this.

Logging on from the Start Menu

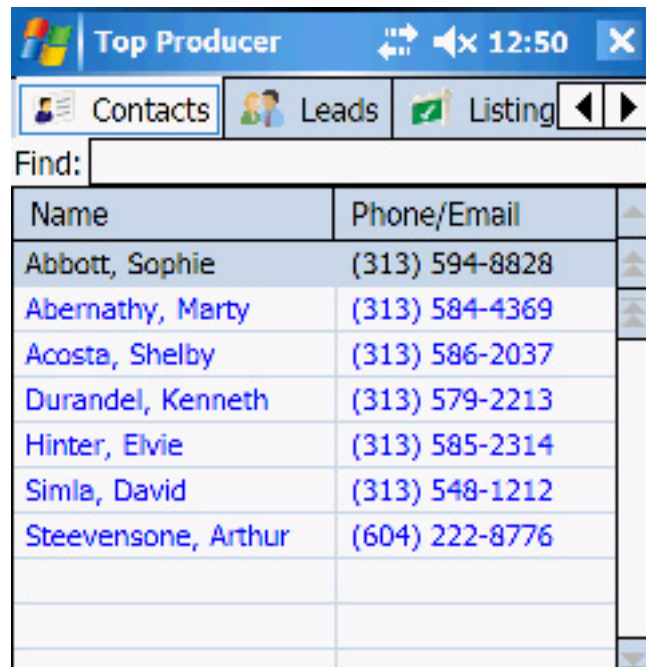
To log onto Top Producer for Windows Mobile from the Start menu:

- 1 From the main screen's **Start** menu, select **Top Producer**.

The message **Initializing Top Producer** will appear. After this, the home screen will appear, displaying tabs for each object (e.g. **Contacts**, **Leads**, and **Closings**).

Note: We recommend that you keep Top Producer for Windows Mobile running constantly, and then shut it down at the end of the day.

While it is running, you can access other applications (such as PowerPoint) from the Start menu. To return to Top Producer from another application, click the Start menu's Top Producer icon.



The screenshot shows the 'Top Producer' application interface on a mobile device. At the top, there is a blue header bar with the application name 'Top Producer', a signal strength indicator, a speaker icon, and the time '12:50'. Below the header, there are three tabs: 'Contacts' (selected), 'Leads', and 'Listing'. A 'Find:' search bar is located below the tabs. The main content area displays a list of contacts in a table format. The table has two columns: 'Name' and 'Phone/Email'. The contacts listed are:

Name	Phone/Email
Abbott, Sophie	(313) 594-8828
Abernathy, Marty	(313) 584-4369
Acosta, Shelby	(313) 586-2037
Durandel, Kenneth	(313) 579-2213
Hinte, Elvie	(313) 585-2314
Simla, David	(313) 548-1212
Steevensone, Arthur	(604) 222-8776

Installing from Top Producer 8i

- *“Step 1 - Assign a License” on page 21*
- *“Step 2 - Define a Filter and Install the Software” on page 22*
- *“Step 3 - Download Data onto your Handheld” on page 25*
- *“Step 4 - Start up Top Producer for Windows Mobile” on page 29*

Step 1 - Assign a License

Follow these steps to make sure that you have been assigned a Top Producer for Windows Mobile license in Top Producer 8i.

To view your active licenses:

- 1 From the **Utility menu** of Top Producer 8i, click **My Account**.
- 2 The header of the *My Account* screen displays every active license you have for your Top Producer account. **Top Producer for Windows Mobile** should be present.
- 3 If no license is present, contact Top Producer. If you are a part of a Broker account, contact your Responsible Agent.

To assign a license to an assistant:

Follow these steps if you purchased more than one license and want to assign a license to an assistant who also has a handheld device.

- 1 From the **Utility menu** of Top Producer 8i, select **My Account**.
- 2 Select the Team Members tab.
- 3 Click on the assistant's name in the Assistants table.
- 4 Click the **Edit Assistant Info** link in the bottom left.
- 5 From the **Assign Licenses and Feature Access** fieldset, select the **Give the assistant access to** check box and select **Top Producer 8i for Windows Mobile** from the drop-down list.
- 6 Click the **Save Assistant Info** button.

Step 2 - Define a Filter and Install the Software

The following instructions assume you have the minimum system requirements installed. For more information, see [“System Requirements” on page 6](#).

To install Top Producer for Windows Mobile:

- 1 Use the USB slot to connect your device to your computer.
- 2 From the Main Menu of Top Producer 8i select the **Mobility** icon.
- 3 From the **My Device** tab, click the **Register a Device** link.
- 4 From the *Register a Device - Step 1* screen, select the **Windows Mobile** radio button and click **Next**.
- 5 From the *Register a Device - Step 2* screen, define the filter settings that you want to use for your device.

For a complete listing of the fields available and how to use them, see the “Filter subtab” topic in the 8i online help.

- 6 When defining your filter settings for **Contacts & Leads**, pay particular attention to the **To Match** radio buttons.
 - Selecting the **All conditions must be met** radio button will result in the criteria you defined being connected with AND statements (i.e. if you specified a Zip code and an area code, only contacts matching both criteria will be synchronized).
 - Selecting the **Match any conditions** radio button will result in the criteria you defined being connected with OR statements (i.e. if you specified a Zip code and an area code, contacts matching either criteria will be synchronized).

Note: The only exception to the To Match setting concerns the multi-select picklists used for the Contact Type, State, and Country fields. The selections you make in the multi-pick picklists are joined internally by OR statements, regardless of the To Match setting. For example, filtering settings including Contact Types and States criteria would be applied as follows: Contact_Types[Buyer OR Seller] AND State[Washington OR Oregon OR Ohio]. This would match Buyers and Sellers from any of the three states specified.

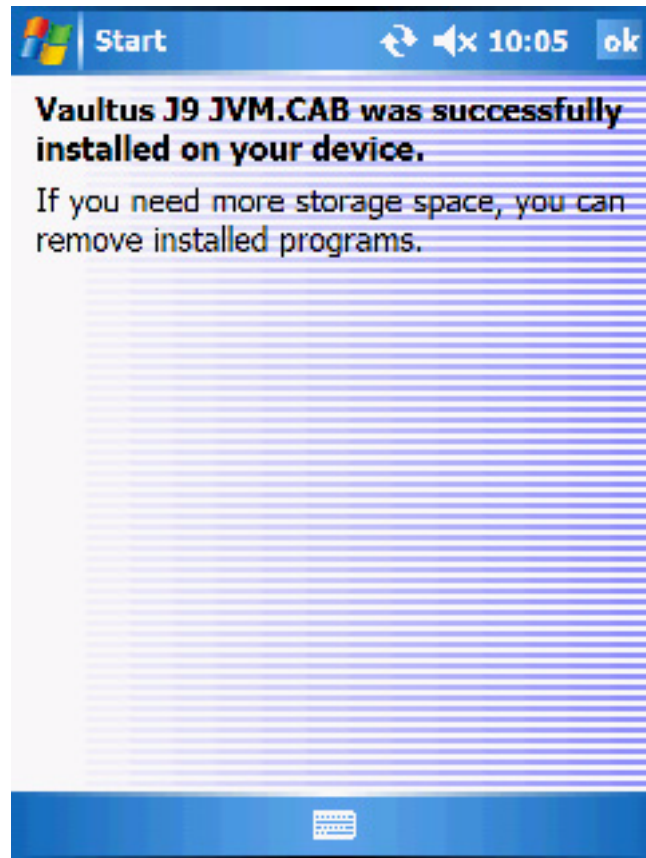
- 7 Click the **Next** button.
- 8 From the *Register a Device - Step 3* screen, click the **Windows Mobile Client Software** link.

The *File Download* dialog box appears.

- 9 Click **Run**.
- 10 When the *Security Warning* dialog box appears, click **Run**.
- 11 Follow the on-screen prompts to install the software.
- 12 When the desktop installation is finished, a message will appear stating that the application will be installed on the next device connection. Click **OK**.

Note: If you are using an expansion memory card, you will be asked whether you wish to install to the handheld's base memory or to the expansion card. Only choose the latter if you are using a high-speed expansion card. **Always install all of the files in just one of the two memory locations. If you don't do this - e.g. you install one file in the handheld's base memory and the other two in the expansion card - Top Producer for Windows Mobile will not run.**

- 13 When the handheld installation finishes, the following message appears:



- 14 Click **OK** to continue. Top Producer for Windows Mobile is now installed on your handheld.

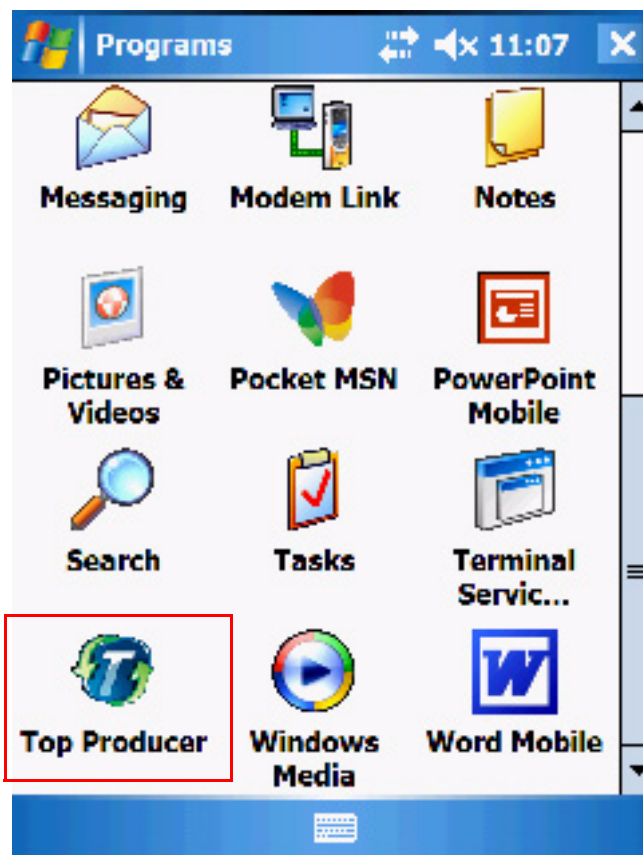
Step 3 - Download Data onto your Handheld

Downloading your Data

The first time you log onto Top Producer for Windows Mobile you will want to download your Top Producer 8i data onto your handheld.

To download Top Producer 8i data onto your handheld:

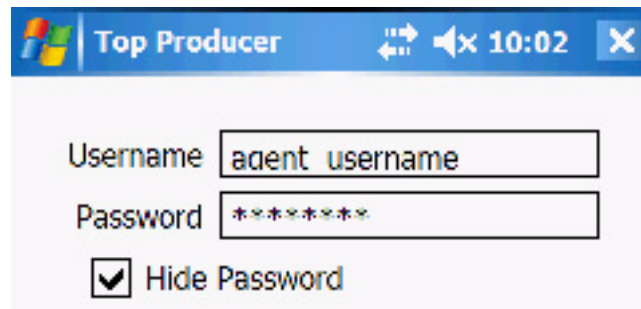
- 1 Connect your handheld to your computer via the USB port.
- 2 From the main screen's **Start** menu, select **Programs**. The **Launch Pad** will appear.



- 3 Tap the Top Producer icon. If this is the first time you've used Top Producer for Windows Mobile, you'll see a

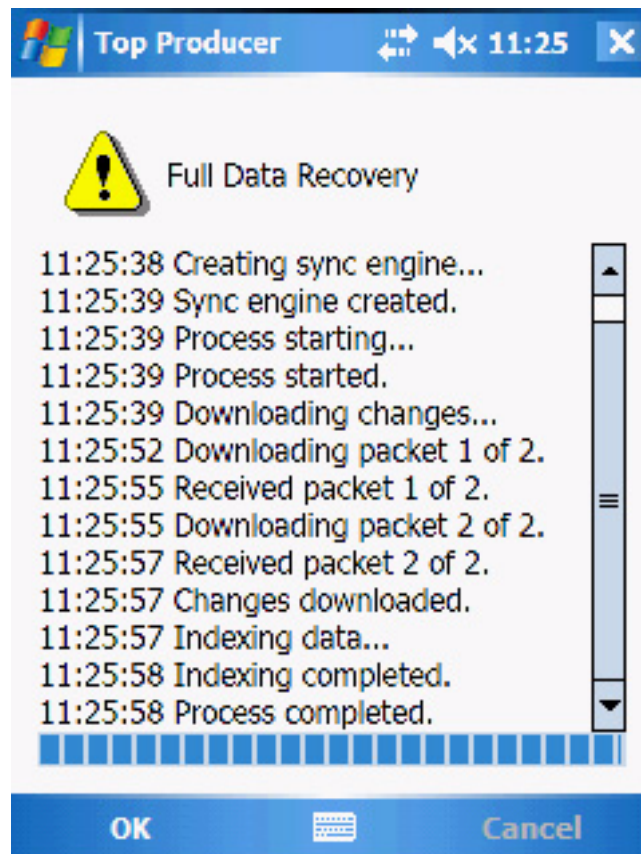
message asking you to log into Top Producer 8i to download your data.

- Click **Yes** and the *Login* screen will appear.



- Enter your Top Producer 7i username and password, then click **Connect** at the bottom left.

The message "connecting, please wait" will appear followed by "login successful." The FDR sequence will now proceed, displaying the sequence of messages shown below..



- When this completes, click **OK**. The Top Producer for Windows Mobile screen will open and display your downloaded data.

Note: Depending on the size of your database and the way your filters are configured, FDR can take between 5 minutes to one hour to complete.

A Note for Windows Vista Users

If you are using Windows Vista and the FDR fails, displaying the message **Error 103**, please perform the following:

To redo FDR after receiving Error 103

- 1 From the Vista main screen, go to **Start > Control Panel > Windows Mobile Device Center**.
- 2 Click **Mobile Device Settings** and then **Connections Settings**. The **Connections Settings** screen opens.
- 3 From the **This computer is connected to** drop-down menu, select either **Work Network** or **The Internet**, then press **OK**.
- 4 Confirm that your Windows Mobile device is connected by viewing the bottom left corner of the Windows Mobile Device Center screen and confirming that the Connection status displays **Connected**.
- 5 If your mobile device is connected, restart the FDR process from Step 2 above. If not, contact Top Producer Technical support.

Step 4 - Start up Top Producer for Windows Mobile

Logging on from the Start Menu

The previous sections describe the steps needed for the first time you use Top Producer for Windows Mobile. The following steps describes how to start up the program after this.

To log onto Top Producer for Windows Mobile from the Start menu:

We recommend that you keep Top Producer for Windows Mobile running constantly, and then shut it down at the end of the day.

While it is running, you can access other applications (such as PowerPoint) from the Start menu. To return to Top Producer from another application, click the Start menu's Top Producer icon.

- 1 From the main screen's **Start** menu, select **Top Producer**.

The message **Initializing Top Producer** will appear. After this, the home screen will appear, displaying tabs for each object (e.g. **Contacts**, **Leads**, and **Closings**).

Contacts

In this chapter:

- *“About Contacts” on page 31*
- *“Finding and Displaying Contacts” on page 32*
- *“Creating a New Contact Entry” on page 38*
- *“Sending Email and Placing and Receiving Calls” on page 40*
- *“Managing a Contact’s Properties” on page 43*
- *“Managing Notes” on page 48*
- *“Editing a Contact Entry” on page 50*

About Contacts

The contact management feature gives you everything you need to store and find information about your clients and prospects.

The contact record can store almost any detail associated with residential real-estate prospects, including their contact and address information, property statistics for their present and future home, and contact notes.

In addition, you can categorize your contacts by contact type so that you can do effective target marketing from Top Producer 7i/8i.

Finding and Displaying Contacts

Summary of Contacts Screen Menu Commands

The Contacts tab displays all of your alphabetically-sorted contacts and leads in one easy-to-access location. You can either view all of the contacts and leads or display only those of a particular contact type (e.g., only Buyers)

The following table summarizes the menu commands available from the Contacts screen. The rest of this section explains these commands in more detail.

Note: The menu commands shown correspond to the contact or lead that has been selected.

Details	View the contact.
Edit	Edit the contact.
Add	Add a new contact.
Call (999-999-9999)	Direct dial the contact.
Email (Contact Name)	Email the contact.
Activities	Activities linked to the contact.
Notes	Notes linked to the contact.
Properties	Properties linked to the contact.
Listings	Listings linked to the contact.
Closings	Closings linked to the contact.
All Phone/Email	Displays all phone numbers and email addresses of the contact.
Market Snapshot	Sends a Market Snapshot to the contact directly.*
Search	Search for Contacts.

Filter By	All displays all contacts and leads. Contact Type displays contacts that match a certain type (e.g. buyer).
Sort By	Sort leads by First Name, Last Name, Full name or Phone/Email.
Cancel	Returns you to the setup screen.
Full Data Recovery	Initiates an over-the-air Full Data Recovery. This reloads your device with data from your Top Producer database. Make sure that you have performed a synchronization, as any pending changes on your device will be overwritten.
Synchronize Data	Initiates a synchronization with Top Producer. Changes to your Top Producer database will be synchronized with the device and changes to the device will be synchronized with your Top Producer database.
About	Displays the copyright and application version information.

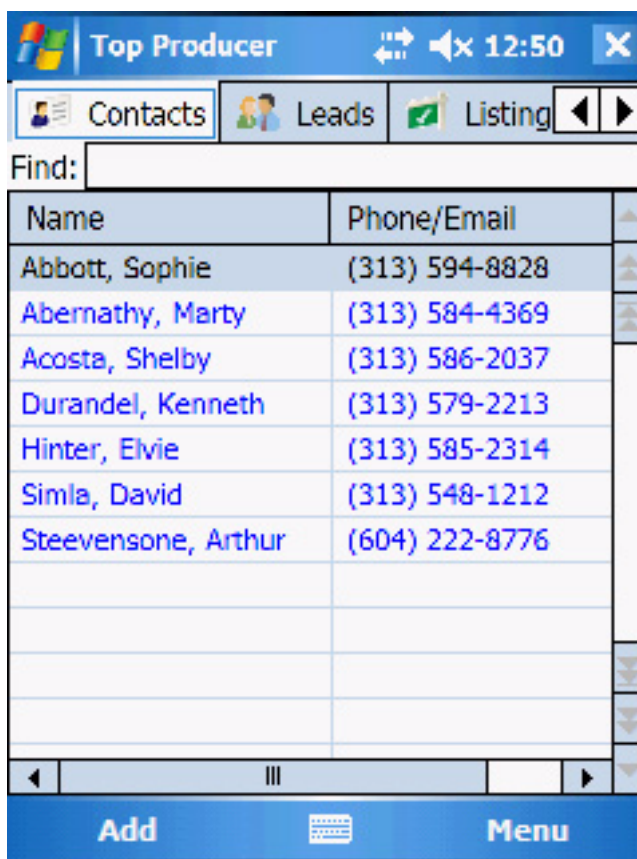
***Note:** Using the Market Snapshot feature requires a valid **Top Marketer** license.

For further information, please visit www.TopProducer.com or contact our sales department at 1-800-241-5309

Accessing the Contacts Screen

To display all contacts:

- 1 Tap the **Contacts** tab. The *Contacts* screen appears.



- 2 Tap the contact record to view the contact's details.

Viewing Contacts by Contact Type

Contact types allow you to categorize your contacts. By default, all contacts—regardless of their contact type—appear on the *Contacts* screen. However, you can view contacts that only have a specific contact type applied.

To view contacts by contact type:

- 1 Tap the **Contacts** tab.

Note: If you tap the **Contacts** tab and continue to press it, a search menu will display. This also works for the other tabs.

- 2 Select **Filter By > Contact Type** from the menu.

The list of available contact types appears.



- 3 Select the desired contact type.

The screen displays only the contacts of that type.

Note: To get the complete list of contacts back again, select **Filter By** from the menu and then choose **All**. The complete list of contacts will then be displayed.

Searching for Contacts

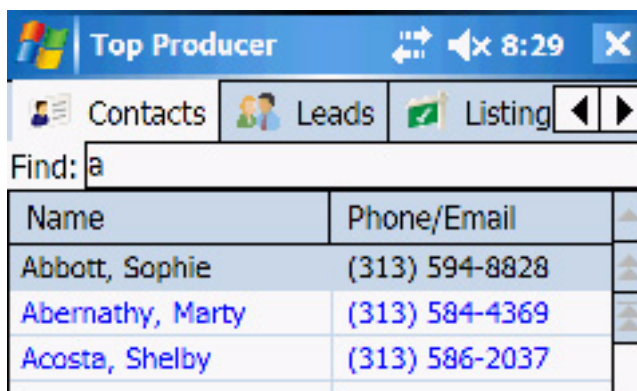
There are two ways you can search for contacts:

- 1 By using the **Find** field just below the tabs. This is great for quickly searching for contacts by surnames.
- 2 By using the *Find Contacts* screen. This allows you to perform more complicated searches using multiple criteria.

To search using the Find field:

- 1 Tap the **Contacts** tab.

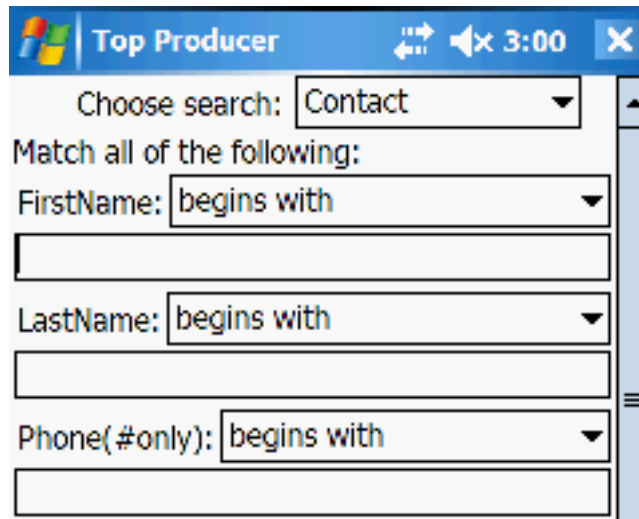
- 2 Enter the first few letters of the surname you are looking for, then press **return**.
- 3 The list of names that match this criteria is displayed.



To search using the *Find Contacts* screen:

- 1 Tap the **Contacts** tab, then select **Search** from the menu.

The *Find Contacts* screen appears.



- 2 Select how you want to search for a contact by completing the following:
 - a) Go to the **pick list** adjacent to the search criteria you want (e.g. **First Name**).
 - b) Select a search constraint (e.g. **Begins with**).
- 3 Enter your search criteria in the text field below (e.g. "b").
- 4 Select **Search**.

A list of contacts matching the search criteria will now be displayed (e.g. all those beginning with **b**).

Sorting Contacts

You can sort your contact's list in several ways (e.g. by last name).

To sort contacts

- 1 Tap the **Contacts** tab.
- 2 From the menu, select the **Sort By...** drop-down menu and choose the desired sort criteria (e.g. **Last Name**). The sorted contacts list will then be displayed.

Creating a New Contact Entry

Use the *New Contact* screen to enter name and address information, present and future property information, and more.

Adding a Contact

To add a new contact:

- 1 Tap the **Contacts** tab, then tap **Add** on the bottom left. The *New Contact* screen appears.

The screenshot shows the 'New Contact' screen in the 'Top Producer' application. The screen has a blue header with the application name and a status bar showing the time as 1:27. Below the header are four tabs: 'General', 'Address', 'Present', and 'Future'. The 'General' tab is selected. The form contains the following fields:

- FirstName: [Text Input]
- LastName: [Text Input]
- Company: [Text Input]
- Type: [Dropdown Menu]
- SFirstName: [Text Input]
- SLastName: [Text Input]
- Home: [Text Input]
- Business: [Text Input]
- Email: [Text Input]
- ShowInList: [Dropdown Menu, currently set to 'Home']
- Mobile: [Text Input]
- Pager: [Text Input]

At the bottom of the screen, there is a blue bar with three buttons: 'Save', a keyboard icon, and 'Menu'.

- 2 Enter the contact's **FirstName**, **LastName** and/or **Company** name.

-
- 3 On the **General** tab, enter the contact's name and contact information. Some key fields are:
- **ShowInList**: Select the contact's primary contact method. This phone number or email address will be the one displayed when the *Contacts* list is viewed.
 - **Type**: Select one or more contact types.

Note: Adding and managing contact types must be done from Top Producer 7i/8i.

If you categorize your contacts by assigning as many contact types as you can, you'll be able to perform searches that generate lists of contacts for target marketing purposes or for calling.

- 4 On the **Address** tab, enter the contact's address details.
- 5 On the **Present** and **Future** tabs, enter the contact's current property details and their ideal future home details.

Note: This information can be used later to match buyers with sellers.

Any information you enter in the **Present** tab will also appear in the **Statistics** tab on the *Property Details* screen. For more information, see ["Editing a Property" on page 46](#).

- 6 Tap **Save**.

Sending Email and Placing and Receiving Calls

Receiving Calls

If you are using Top Producer for Windows Mobile and someone calls, a screen displaying the caller's number appears. You can choose to either **Answer** or **Ignore** the call.

To answer an incoming call:

- 1 When someone is trying to call you, the *Incoming Call* screen appears.
- 2 To answer the call, select **Answer**.

Your call will be connected.

Note: This is the default functionality of the device.

Calling a Contact

You can call someone from their contact record simply by selecting a menu item.

To place an outgoing call:

- 1 Select the **Contacts** tab.
- 2 Select the contact you want to call.
- 3 Select **Call [number]** from the menu. If you are asked to confirm the call, select **Yes**.

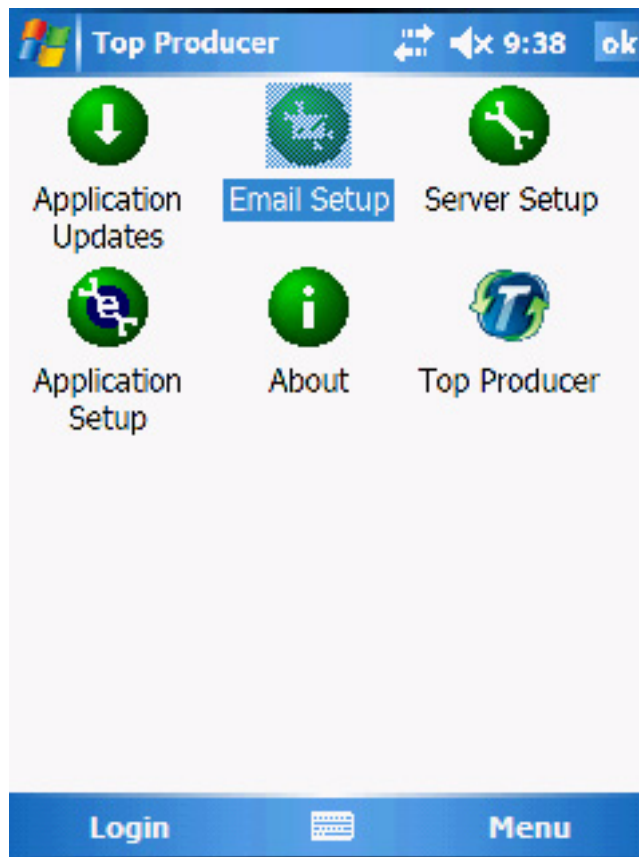
Email Setup

Top Producer for Windows Mobile allows you to send email directly from within the application. But before you can do this, you must specify the default email account that it will use.

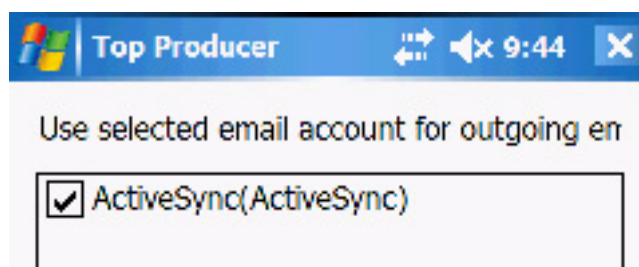
To set the default Top Producer email account:

- 1 From the handheld's main screen, select **Start > Programs**. The *Programs* screen appears.
- 2 Click on the Top Producer icon to start Top Producer for Windows Mobile. The *Contacts* screen appears.

- 3 Click the **X** in the top right. The *Setup* screen appears.



- 4 Click the **Email Setup** icon. A list of your available email accounts will appear.



- 5 Put a check mark in the check box next to the email account you would like to use, then click **OK**. Note that the ActiveSync account is selected by default.

You should now be able to send and receive email using Top Producer for Windows Mobile.

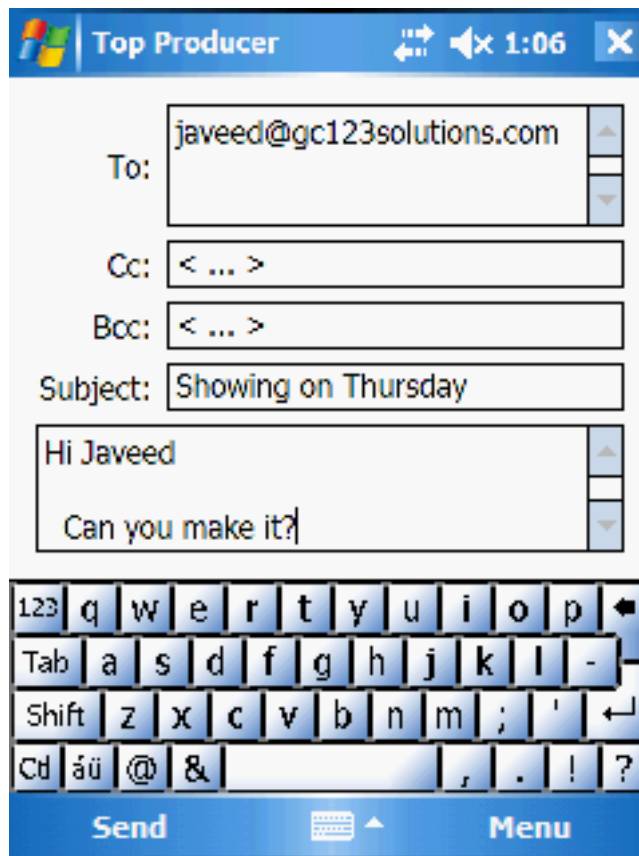
Sending Email

You can email someone from their contact record simply by selecting a menu item.

To send an email:

- 1 Select the **Contacts** tab.
- 2 Select the contact you want to email.
- 3 Select **Email [Contact Name]** from the menu.

The *Email Entry* screen opens.



- 4 Enter the email's subject.
- 5 Enter the message body in the area below.
- 6 When you're finished, select **Send** from the menu.

Managing a Contact's Properties

Use the *Associated Properties* screen to manage a contact's multiple properties. From this screen, you can:

- Add a property
- Add property notes
- Edit a property

Adding a Property

You can enter the property's address, statistics, dimensions and type (e.g. **Investment** or **Other**).

To add a property:

- 1 Tap the **Contacts** tab.
- 2 Select the contact whose properties you want to view.
- 3 Select **Properties** from the menu.

All properties associated with the selected contact will appear.

- 4 Tap **Add**.

The *Add Properties* screen will appear.

The screenshot shows the 'Add Properties' screen in the 'Top Producer' application. The 'Address' tab is active, and the following fields are visible:

- PropertyType:** Investment (dropdown menu)
- MailToAddress:**
- HouseNumber:** [Text input field]
- DirectionPrefix:** [Dropdown menu]
- StreetName:** [Text input field]
- StrDesignator:** [Dropdown menu]
- DirectionSuffix:** [Dropdown menu]
- SuiteNumber:** [Text input field]
- POBox:** [Text input field]
- Building/Floor:** [Text input field]
- City:** [Dropdown menu]

At the bottom of the screen, there are two buttons: 'Save' and 'Menu'.

- 5 On the **Address** tab, enter the property's address information.
 - Select the **PropertyType** you are adding (e.g. **Primary**, **Investment** or **Other**).
 - Tap the **MailToAddress** check box to use this address in any future mailings to the contact.
- 6 On the **Statistics** tab, enter the property's details.

Table 1: Property Statistics

Field Name	Description
TaxAssmnt\$	Enter the total value of the land assessment and building improvements. This value is determined by the tax assessment department.

Table 1: Property Statistics

Field Name	Description
LandAssmnt\$	Enter the dollar amount of the land. This value is used to determine the total tax assessment
BldgImprov\$	Enter the dollar amount of the building improvements. This value is used to determine the total tax assessment.
TaxRollNo	Type the number that appears on the property tax form.
LegalDesc	Enter the legal address applied to the property by the appropriate government agency.

- 7 On the **Dimensions** tab, enter the room dimensions. Enter lengths in fields marked with an **L**; widths in fields marked with a **W**.
- 8 When you're finished, tap **Save**.

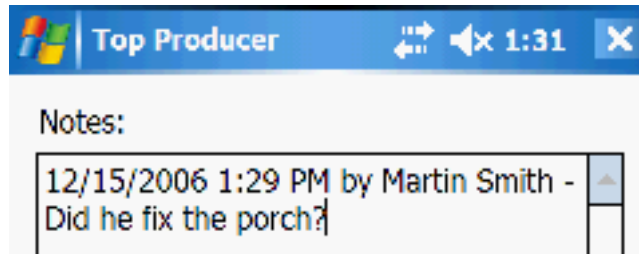
Adding Property Notes

To add comments about a property:

- 1 Tap the **Contacts** tab.
- 2 Select the contact whose properties you want to view.
- 3 Next, select **Properties** from the menu.
The *Properties* screen opens.
- 4 From the menu, select **Notes**.
The *Associated Notes* screen opens.

- 5 To add a note, tap **Add**.

The *Property Note Add* screen appears.



- 6 Enter the information and then select **Save**.

The *Associated Notes* screen reopens.

Note: To modify or delete notes, select either **Edit** or **Delete** from the menu. For more information, see ["Managing Notes" on page 48](#).

Editing a Property

To modify a property's information:

- 1 Tap the **Contacts** tab.
- 2 Select the contact whose properties you want to edit.
- 3 From the menu, select **Properties**.
- 4 Select the property you want to modify, and then select **Edit** from the menu.
- 5 Modify the property's information. For more information about modifying property information, see ["Adding a Property" on page 43](#).
- 6 When you're done, select **Save**.

Sorting Properties

To sort property information:

- 1 Tap the **Contacts** tab.
- 2 Select the contact whose properties you want to sort.
- 3 Select **Properties** from the menu.

- 4 Next, select **Sort By** from the menu and then select the sorting criteria you want (e.g. by **address** or by **property type**).

The properties will display sorted by the criteria you've chosen.

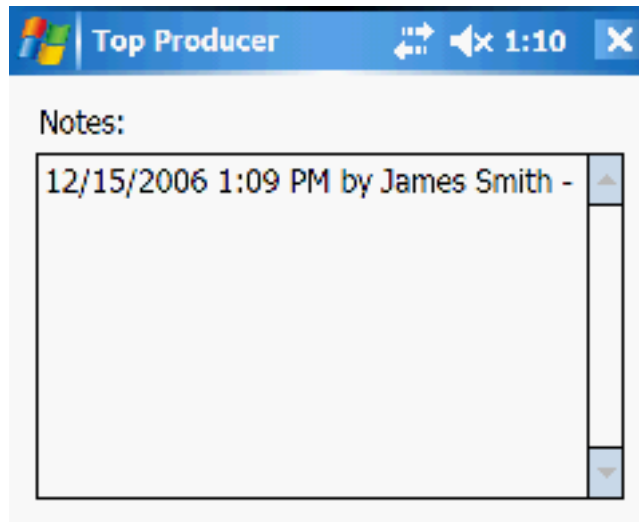
Managing Notes

Use **Notes** to add comments and details about the contact you are working with. The date and time the note is entered is automatically stamped on each note.

To add, modify or delete notes:

- 1 Tap the **Contacts** tab.
- 2 Select and open the contact whose notes you want to modify.
- 3 Select **Notes** from the menu. The list of notes associated with this contact will appear.
- 4 To add a note:
 - a) Tap **Add**.

The *Contact Note Add* screen will appear.



- b) Enter your note and then tap **Save**.
- 5 To edit a note:
 - a) Select the note.

- b) From the menu, select **Edit**.
 - c) Modify the note and then tap **Save**.
- 6 To delete a note:
- a) Select the note you want to delete.
 - b) From the menu, select **Delete**.
 - c) When prompted to confirm, tap **Yes**.

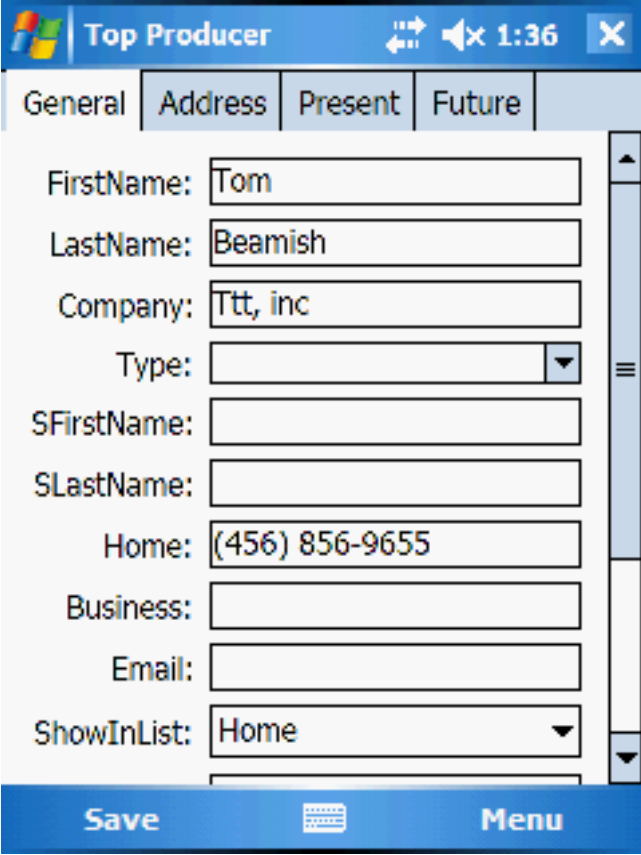
Editing a Contact Entry

You can modify the name, address and property information for the selected contact.

To edit a contact:

- 1 Tap the **Contacts** tab.
- 2 Select the contact you want to modify.
- 3 From the menu, select **Edit**.

The *Contact Edit* screen opens.



The screenshot shows the 'Top Producer' application interface for editing a contact. The top status bar displays the Windows logo, the app name 'Top Producer', and system icons for navigation, volume, and a timer at 1:36. Below the status bar is a tabbed interface with 'General', 'Address', 'Present', and 'Future' tabs. The 'General' tab is active, showing a form with the following fields: 'FirstName' (Tom), 'LastName' (Beamish), 'Company' (Ttt, inc), 'Type' (dropdown menu), 'SFirstName', 'SLastName', 'Home' ((456) 856-9655), 'Business', 'Email', and 'ShowInList' (Home). The bottom of the screen features a blue bar with 'Save', 'Menu', and 'Save' buttons.

- 4 Modify the contact's information. When you're done, tap **Save**.

Leads

In this chapter:

- *“About Leads” on page 52*
- *“Using the Leads Screen” on page 53*
- *“Creating a Lead” on page 57*
- *“Following-up on a Lead” on page 58*
- *“Editing a Lead Record” on page 60*

About Leads

The *Leads* screen displays all of your leads as one list. It doesn't display contacts that are not leads. You can either view all leads or display only those of a particular type.

Leads can be accessed from both the **Leads** and the **Contacts** tab. You can either manually enter leads or receive Internet-generated leads from Top Producer 7i/8i.

In order to receive Internet-generated leads, you must:

- 1 Set up Top Producer 7i/8i to receive leads. For more information, see the Top Producer 7i/8i documentation.
- 2 Synchronize your device with Top Producer 7i/8i to receive these leads on the handheld. For more information, see *"Performing a Synchronization" on page 96*.

Using the Leads Screen

The **Leads** screen displays all of your leads sorted by date. You can either view all leads or display only those that have a particular lead status (e.g. **New only**).

Summary of Lead's Screen Menu Commands

The following table summarizes the menu commands available from the **Leads** screen. The rest of this section explains these commands in more detail.

Note: The menu commands shown correspond to the lead that has been selected.

Details	View the lead.
Edit	Edit the lead.
Add	Add a new lead.
Call (999-999-9999)	Direct dial the lead.
Email (Contact Name)	Email the lead.
Activities	Activities linked to the lead.
Notes	Notes linked to the lead.
Properties	Properties linked to the lead.
Listings	Listings linked to the lead.
Closings	Closings linked to the lead.
Market Snapshot	Sends a Market Snapshot to the lead directly.*
Search	Search for leads.
Filter By	Filter By All displays all leads. Filter By Status displays leads with a specific status (New , Followed Up , etc.).
Sort By	Sort leads by name or date.
Cancel	Returns you to the setup screen.

Full Data Recovery	Initiates an over-the-air Full Data Recovery. This reloads your device with data from your Top Producer database. Make sure that you have performed a synchronization, as any pending changes on your device will be overwritten.
Synchronize Data	Initiates a synchronization with Top Producer. Changes to your Top Producer database will be synchronized with the device and changes to the device will be synchronized with your Top Producer database.
About	Displays copyright and application version information.

***Note:** Using the Market Snapshot feature requires a valid **Top Marketer** license.

For further information, please visit **www.TopProducer.com** or contact our sales department at 1-800-241-5309.

Displaying and Editing Leads

To display and edit leads:

- 1 Tap the **Leads** tab.

The *Leads* screen appears.

- 2 Tap **Details** to view the lead's information.

Alternatively you can highlight the lead and choose **Edit** from the Menu

- 3 To edit a lead's details, select the lead and then select **Edit** from the menu.

The *Edit Leads* screen appears.

The screenshot shows the 'Edit Leads' screen in the 'Top Producer' application. The window title is 'Top Producer' and it shows a battery level of 1:20. The screen is divided into four tabs: 'General', 'Address', 'Present', and 'Future'. The 'General' tab is active. The form contains the following fields:

- FirstName: Dean
- LastName: Norman
- Company: (empty)
- Source: Ad (dropdown menu)
- Type: Buyer (dropdown menu)
- SFirstName: (empty)
- SLastName: (empty)
- Home: (empty)
- Business: (empty)
- Email: norman@nmdean.com

At the bottom of the screen, there are two buttons: 'Save' and 'Menu'.

- 4 Make the edit and then tap **Save**. For more information, see [“Editing a Contact Entry” on page 50](#).

Viewing Leads by Status

A lead’s status shows what stage the lead is in. The status can be one of:

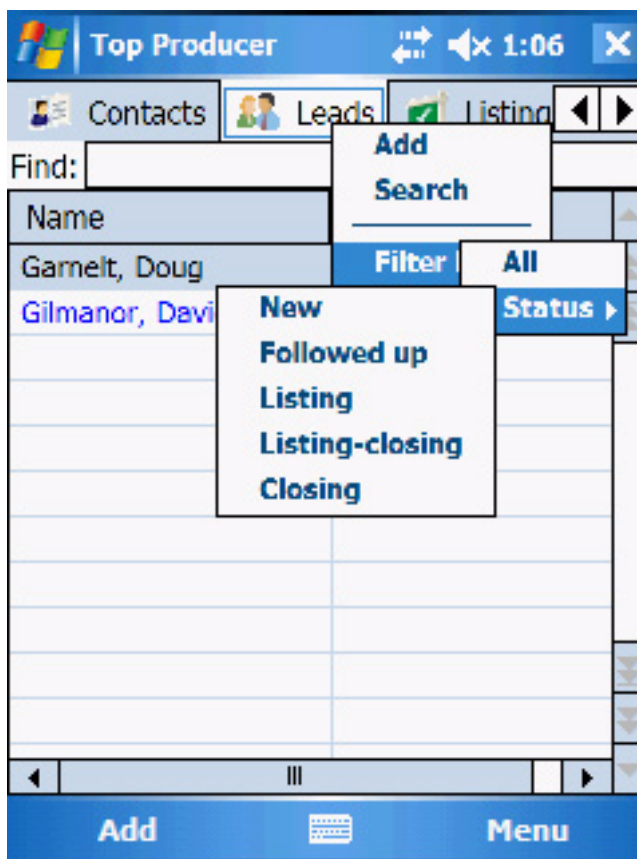
- **New:** Nothing has been done to follow up with the lead.
- **Followed up:** An activity has been performed for the lead and marked done.
- **Listing:** A listing has been created for the lead.
- **Listing-closing:** A closing has been created from the lead's listing record.
- **Closing:** A closing has been created for the lead.

To view leads by status:

- 1 Tap the **Leads** tab.
- 2 Select one of the leads from the list.

- 3 From the menu, select the **Filter By Status** drop-down menu.

The list of available statuses appears.



- 4 Select the status you want to view (e.g. select **New** to view all your new leads).

The list now displays only those leads with the desired status.

Creating a Lead

When you add a new lead, it will automatically be given **New** status until you follow it up.

Adding a Lead

To add a lead:

- 1 Tap the **Leads** tab, then tap **Add** on the bottom left.
- 2 Select the lead's source from the **Source** pick list. This is a required field—which means that the data won't be saved unless you make a selection from this list.

Tip: The lead's source information will help you determine which lead-generating methods are bringing in the most leads.

- 3 Enter the rest of the lead information. For more information, see ["Creating a New Contact Entry" on page 38](#).
- 4 When you're finished, select **Save**.

The contact will now appear in the **Leads** list, ready for follow-up.

Following-up on a Lead

As in Top Producer 7i/8i, you can follow up a lead by assigning an activity to it.

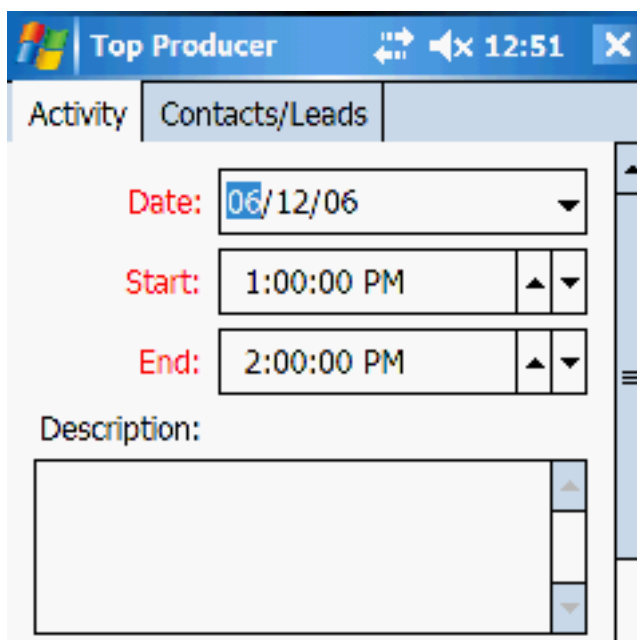
When the activity is completed and marked **done**, the lead is assigned a **Followed up** status. If the follow-up action is marked **done** in Top Producer 7i/8i, the lead will change to a **Followed up** status in Top Producer for Windows Mobile only after synchronization.

Following-up on a Lead

To follow-up on a lead:

- 1 Tap the **Leads** tab, then select the lead you want to follow-up on.
- 2 Select **Activities** from the menu. The list of activities associated with this lead will appear.
- 3 Select **Add** from the menu. Then from the drop-down menu, select one of the follow-up activity types (i.e **Appointment**, **Call** or **To-do**).

- 4 Enter the activity's details.



The screenshot shows the 'Top Producer' application window with a blue title bar. Below the title bar, there are two tabs: 'Activity' and 'Contacts/Leads'. The 'Activity' tab is selected. The form contains the following fields:

- Date:** A date picker showing '06/12/06'.
- Start:** A time picker showing '1:00:00 PM'.
- End:** A time picker showing '2:00:00 PM'.
- Description:** A text area with a scroll bar.

- 5 When you're finished, tap **Save**.

Note: When the follow-up activity has been completed and marked **done**, the lead will be assigned a **Followed up** status.

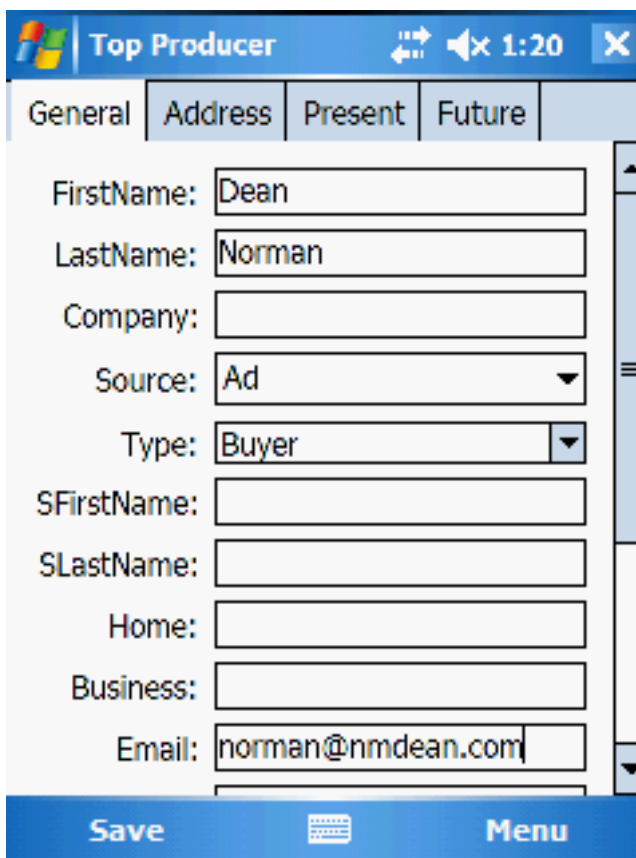
Editing a Lead Record

You can modify a lead's name, address, and property information.

Editing a Lead

To edit a lead:

- 1 From the main screen, tap the **Leads** tab, then select the lead you want to modify.
- 2 From the menu, select **Edit**. The *Edit Lead* screen appears



The screenshot displays the 'Edit Lead' screen in the Top Producer mobile application. The title bar at the top shows 'Top Producer' with navigation icons and a timer set to 1:20. Below the title bar, there are four tabs: 'General', 'Address', 'Present', and 'Future', with 'General' currently selected. The form contains the following fields:

- FirstName: Dean
- LastName: Norman
- Company: (empty)
- Source: Ad (dropdown menu)
- Type: Buyer (dropdown menu)
- SFirstName: (empty)
- SLastName: (empty)
- Home: (empty)
- Business: (empty)
- Email: norman@nmdean.com

At the bottom of the screen, there is a blue bar with two buttons: 'Save' and 'Menu'.

- 3 Modify the lead's information. For more information, see ["Creating a New Contact Entry" on page 38](#).
- 4 When you're done, tap **Save**.

Time Management

- *“About Activities” on page 62*
- *“Displaying Activities” on page 63*
- *“Scheduling Activities” on page 69*
- *“Changing an Activity’s Details” on page 73*
- *“Reassigning Activities from the Calendar” on page 75*
- *“Marking an Activity Done” on page 76*
- *“Deleting an Activity” on page 77*

About Activities

From your handheld, you can easily schedule and manage all of your appointments, calls and to-do activities.

You can schedule activities either for yourself or for your assistant. You can also set reminders so that you never forget to complete important tasks. Then once you've completed the activity, you can mark it **done**. This ensures that it's added to the appropriate Top Producer 7i/8i report.

The calendar provides a daybook-planner view for keeping track of all your appointments and timed calls. You can view and access your appointments in daily, weekly and monthly views.

In addition, **Today's Activities** gives you instant access to the activities themselves, letting you review the details of each one.

Displaying Activities

Summary of Today's Activities Screen Menu Commands

The following table summarizes the menu commands available from the **Today's Activities** screen. The rest of this section explains these commands in more detail.

Note: The menu commands shown correspond to the activity that has been selected.

You can display both a list and a count of all of the day's

My Calendar	Displays the Calendar.
Filter By	Displays activities by category (e.g., All or Pending).
Filter By Assigned To	Displays activities assigned to a particular agent or assistant.
Synchronize Data	Initiates a synchronization with Top Producer. Changes to your Top Producer database will be synchronized with the device and changes to the device will be synchronized with your Top Producer database.
Sort By	Sort activities by Description, Type, or Date.
Login	If your current status is Off-line , this allows you to login to Top Producer prior to synchronizing changes.
Customize	Allows you to modify the way that tabs are displayed. It also allows you to hide the Top Producer logo.
About	Displays the copyright and application version information.
Full Data Recovery	Initiates an over-the-air Full Data Recovery. This reloads your device with data from your Top Producer database. Make sure that you have performed a synchronization, as any pending changes on your device will be overwritten.
Full Data Recovery Via Email	Initiates an Full Data Recovery via email. This reloads your device with data from your Top Producer database. Make sure that you have performed a synchronization, as any pending changes on your device will be overwritten.
Shutdown	Shuts down the Top Producer application on the device.
Close	Closes the Top Producer application on the device, but keeps it running in memory, so that it can be opened quickly.

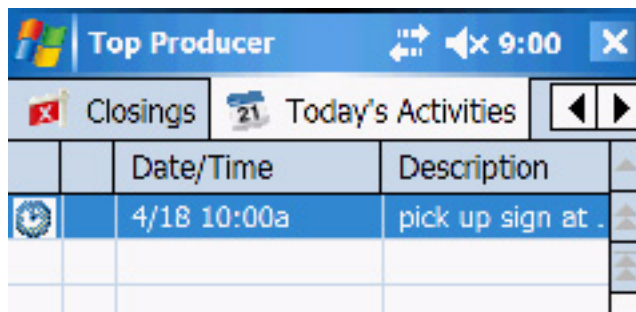
activities.

Note: Timed calls appear in the Appointments list.

Viewing a List of all Activities

To view an activity list

- 1 Tap the **Today's Activities** tab. All your appointments, calls and to-do activities are displayed.



- 2 To view the details of an activity, select the activity and then select **Details** from the menu.
- 3 To edit the details, select **Edit** from the menu.

Note: Edited information is not automatically saved. Make sure you tap **Save** anytime you modify or create information.

Calendar View

By selecting the **My Calendar** menu item from **Today's Activities**, you can display your activities in the daybook-planner view. This is called the *Calendar View*. This view allows you to display your schedule in the following ways:

- **All view:** This displays all scheduled events as a chronological list.
- **Month view:** This view looks much like a calendar, with the current day displayed in bold red.
- **Day view:** This provides a convenient overview of your agenda for the selected day.
- **Week view:** This view shows Sunday through Saturday, with the current day displayed in bold red.

Note: There are two key points to keep in mind about the *Calendar View*:
(1) Only timed activities (e.g. appointments)

and timed calls) will appear in the calendar.
(2) Only the device-owner's activities are displayed.

Viewing Activities from the Calendar

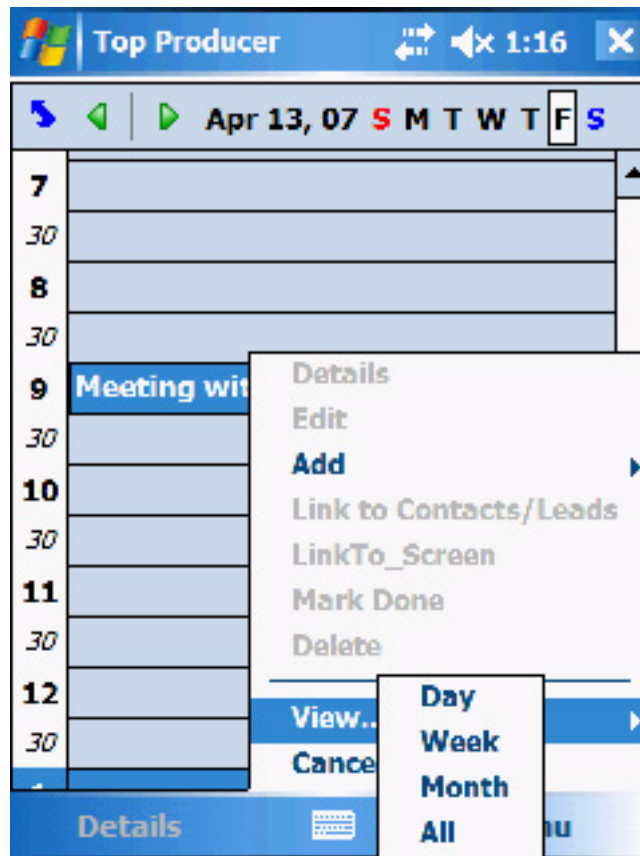
To view activities from the calendar:

- 1 Tap on the **Today's Activities** tab
- 2 Select **My Calendar** from the menu.

By default, the calendar's **Day view** appears.

- 3 To see activities in one of the various views (i.e. All, Pending, Done, List, Month, Day, Week, or Assigned To), choose **View** from the menu, then choose the desired view from the drop-down menu.

Tip: The green arrows allow you to navigate from day to day. The blue arrow to the left returns you to today's date. Tap on the date to reveal a calendar or tap on the S, M, T, etc. to display that day.



- **Week view:** This view shows your activities for the whole week (Sunday to Saturday).

Note: In the various calendar views, you can only view activities that are assigned to you. You can't view those that are assigned to another team member.

Filter By Assigned To

You can filter activities by who the activity is assigned to. In addition, you can view your assistant's schedule or, if you are part of a team/partnership account, you can view a team member's schedule.

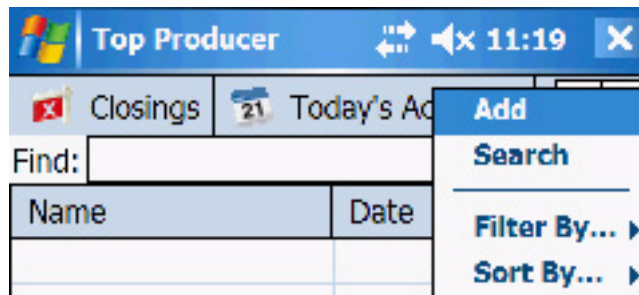
Filtering activities by who they are assigned to

- 1 Tap the **Today's Activities** tab.
- 2 Select an activity from the displayed list.
- 3 From the menu, select **Filter By Assigned To**.
- 4 Select the assignee whose activities you want to see.

The assignee's activities will appear.

Note: You can also select **Filter By** by pressing and then keeping pressure on the **Today's Activities** tab.

When you do this, a drop down menu will appear and present the available options. This technique also works with the other tabs.



Scheduling Activities

You can schedule calls, appointments and to-do activities. Only timed activities (e.g. appointments and timed calls) will appear in the calendar.

All activities—regardless of whether you specified a start and end time—will appear in **Today's Activities**.

Note: The scheduling of appointments and repeating activities must be done in Top Producer 7i/8i.

Scheduling an Activity

To schedule an activity:

- 1 Tap the **Today's Activities** tab.
- 2 From the menu, select **Add** and from that drop-down menu select the activity type that you want to add (e.g. an appointment).

The appropriate screen appears.

The screenshot shows the 'Top Producer' application interface. At the top, there's a blue header with the Windows logo, the text 'Top Producer', and system icons for connectivity, volume, and time (10:30). Below the header, there are two tabs: 'Activity' and 'Contacts/Leads'. The 'Contacts/Leads' tab is active. The form contains the following fields:

- Date:** A dropdown menu showing '08/12/06'.
- Start:** A time selection field showing '11:00:00 AM' with up and down arrows.
- End:** A time selection field showing '12:00:00 PM' with up and down arrows.
- Description:** A text area containing the text 'get sign at Smith's'.
- AssignedTo:** An empty dropdown menu.
- Alarm:** A checkbox that is checked.

At the bottom of the screen, there is a blue bar with a 'Save' button, a keyboard icon, and a 'Menu' button.

- 3 Enter the activity's details—the following table describes some key activity details fields.

Table 2: Activity Details

Field Name	Description
Date	Enter the date. For more information, see <i>"Specifying Dates and Times" on page 103.</i>

Table 2: Activity Details

Field Name	Description
Start and End	Enter the activity's start and end time. This option is available for calls and appointments only. For example, to set the Start time, tap on the hour value and then use the spin buttons to change it. Repeat this for minutes, etc. Note that if you set a time for a call, it will appear in both the calendar and Today's Activities as an appointment.
Description	Enter a description of the activity.
AssignedTo	Enter who will be performing the activity by selecting an entry from the pick list.

- 4 To set an alarm for either a call or an appointment:
 - a) Put a check mark in the **Alarm** field by tapping on it.
 - b) In the **Min.Before** field, enter the number of minutes that you want the alarm to remind you in advance of the activity. The default is 15 minutes; the maximum is 180.

A reminder screen will appear at the specified time.

Note: If you are modifying a repeating activity, alarm settings will only affect the one instance of the activity.

Also, note that alarms will not appear if your handheld's Top Producer application has been shut down (i.e. you closed the **Launch Pad** and answered **Yes** to the question "Are you sure you want to exit Top Producer?").

However, alarms will appear if the application is still running in the background (i.e. you closed the application by tapping the **X** at the top right of the screen.)

- 5 The **LinkTo** section allows you to link an activity to a listing or a closing. When the activity is marked **done**, it will appear in the appropriate Top Producer 7i/8i service report. To do this:

- a) Select either **Listing** or **Closing** from the **LinkTo** pick list.
 - b) Tap the **Listing** (or **Closing**) icon just below. When the list is displayed, select the appropriate entry.
- 6 Tap the **Contacts/Leads** tab to associate this activity with a contact.
- a) From the menu, select the **Contacts/Lead** drop-down menu, then select **Add Contact/Lead**.
 - b) Tap on the search icon to find the contact you are creating the activity for.
- 7 When you're finished, select **Save**.

Changing an Activity's Details

Editing an Appointment's Details

From your handheld, you can specify alarm settings, as well as view and edit appointment details. Any other modifications must be made from Top Producer 7i/8i.

To modify an appointment:

- 1 Tap the **Today's Activities** tab.
- 2 Select the appointment from the list below.
- 3 Select **Edit** from the menu.

The *Appointment Edit* screen will be displayed.

The screenshot shows the 'Appointment Edit' screen in the Top Producer application. The title bar at the top indicates 'Top Producer' and the time '9:37'. Below the title bar, there are two tabs: 'Activity' and 'Contacts/Leads'. The main content area contains the following fields:

- Date:** A date picker showing '12/12/06'.
- Start:** A time picker showing '1:00:00 PM'.
- End:** A time picker showing '2:00:00 PM'.
- Description:** A text area containing the text 'pick up sign'.

- 4 You can now make the desired edits. When you're finished, tap **Save**.

Editing an Activity

To modify activity details:

- 1 Tap the **Today's Activities** tab.
- 2 Select the activity you want to modify from the list (e.g. an appointment).
- 3 Select **Edit** from the menu.

The appropriate edit screen displays.

- 4 Modify the activity's details:
- 5 When you're finished, select **Save**.

Note: With repeating activities, you can only (1) modify their alarm settings or (2) mark them as done. All other details must be modified from Top Producer 7i.

Reassigning Activities from the Calendar

You can reassign an activity to either another team member or an assistant.

Reassigning an Activity

To reassign an activity:

- 1 Tap the **Today's Activities** tab.
- 2 Select the activity you want to reassign.
- 3 Select **Edit** from the menu.
- 4 From the **AssignedTo** pick list, select the team member from the list.
- 5 Select **Save**.

Marking an Activity Done

When an activity has been completed, you should mark it **done**. Activities marked **done** will appear in activity lists with a check mark next to them to indicate completion.

Note: Activities that are marked **done** can't be modified, but you can create and delete notes for them.

Marking an Activity Done

To mark an activity done:

- 1 Tap the **Today's Activities** tab. The list of activities will appear.
- 2 Select the activity you want to mark **done**.
- 3 Select **Mark Done** from the menu.

The list of activities will reappear; the activity that you marked as **Done** will now have a check-mark in the second column.

Deleting an Activity

You can only delete repeating activities if you've marked them **done** on the handheld. For more information, see ["Marking an Activity Done" on page 76](#).

Deleting an Activity

To delete an activity:

- 1 Tap the **Today's Activities** tab.
- 2 Select the activity you want to delete.
- 3 Select **Delete** from the menu.
- 4 When prompted, select **Yes** to delete it.

Listings

In this chapter:

- *“About Listings” on page 79*
- *“Viewing Current Listings” on page 80*
- *“Editing a Listing” on page 82*
- *“Viewing Listing Sellers” on page 85*
- *“About Frozen Listings” on page 86*

About Listings

You can efficiently manage all aspects of your listings. The listing record tracks detailed listing information, such as list price, source, house style, property statistics, seller information, notes, photos and more.

You can also add activities—such as phone calls and appointments—that are involved with the listing. Your activities will automatically appear in **Today's Activities** as they come due.

This will ensure that you will have a reliable reminder of what you need to do every day.

Viewing Current Listings

The **Listings** screen displays contacts who are selling properties. You can either view all of the listings or display only those with a particular status.

Summary of Listings Screen Menu Commands

The following table summarizes the menu commands available from the **Listings** screen. The rest of this section explains these commands in more detail.

Note: The menu commands shown correspond to the listing that has been selected.

Details	View the listing.
Edit	Edit the listing.
Activities	Activities linked to the listing.
Notes	Displays a list of notes linked to the listing.
Seller Parties	Displays the names of the listing's sellers
Search	Search for listings.
Filter By	Filter By All displays all listings. Filter By Listing Status displays listings that match a specific status (Active , Expired , etc).
Sort By	Sort listings by Full, First or Last name.
Cancel	Returns you to the setup screen.
Full Data Recovery	Initiates an over-the-air Full Data Recovery. This reloads your device with data from your Top Producer database. Make sure that you have performed a synchronization, as any pending changes on your device will be overwritten.

Synchronize Data	Initiates a synchronization with Top Producer. Changes to your Top Producer database will be synchronized with the device and changes to the device will be synchronized with your Top Producer database.
About	Displays the copyright and application version information.

Accessing the Listings Screen

- To display all listings:
 - 1 Tap the **Listings** tab.
The *Listings* screen appears.
 - 2 Select **Details** to view a listing's details.
 - 3 To edit a listing's details, select **Edit** from the menu. For more information, see ["Editing a Listing" on page 82](#).

Viewing Listings by Status

To view listings by status:

- 1 Tap the **Listings** tab and then select the listing you want to view.
- 2 From the menu, select the **Filter by...** drop-down menu. You can also display this menu by tapping and holding the **Listings** tab.
- 3 From there select either **All** or the desired listing status (e.g. **Active**, **Expired**, or **Pending**). For example, select **Active** to only see active listings.

Listings of the desired status are displayed.

- 4 To re-display the complete set of listings, select **Filter by** from the menu. Then select **All** from that drop-down menu.

The complete set of listings is displayed.

Note: Listings with the following statuses are considered 'frozen': **Expired**, **Withdrawn**, **Cancelled**, **Closed/Paid transferred**. **Closed/Paid** listings are considered frozen only if they're not linked to a closing.

Editing a Listing

Use the *Listings* screen to modify listing information. If you are viewing a frozen Listing, only certain options will be available. For more information, see [“About Frozen Listings” on page 86](#).

Note: New listings must be added from Top Producer 7i/8i. They will appear on your handheld after you synchronize your data. For more information, see [“Performing a Synchronization” on page 96](#).

Editing an Existing Listing

To edit an existing listing:

- 1 From the main screen, tap the **Listings** tab.
- 2 To modify listing notes or activities, select the listing you want to modify.
 - a) To work with activities, select **Activities** from the menu, then select the activity that you want to modify. For more information, see [“Time Management” on page 61](#).
 - b) To work with notes, select **Notes** from the menu, then select the note that you want to modify. For more information, see [“Managing Notes” on page 48](#).
- 3 To modify other listing information, select the listing from the *Listings* screen, then select **Edit** from the menu.

The *Listing Edit* screen opens.

- 4 You can now edit the listing’s details. The following table describes some key listing details fields.

Table 3: Listing Edit Fields

Field Name	Description
Address	The address of the selling property.
ListPrice	The price the property is selling for.
LockBox	If a lock box has been installed on the property, place a check mark in the LockBox checkbox.
Seller	This displays the primary seller's name. To view a list of all sellers, see "Viewing Listing Sellers" on page 85 .
MLSno	This displays the listing's Multiple Listing Service (MLS) number. If you do not use an MLS board, leave this field blank.
ListingStatus	This pick list allows you to display the listing's status (e.g. Active and Pending/Firm). Note that if the listing is linked to a closing, you can't modify the listing's status.
ListingDate	Select the listing date from the calendar. For more information, see "Specifying Dates and Times" on page 103 .
ExpiryDate	Select the listing's expiry date from the drop-down calendar. For more information, see "Specifying Dates and Times" on page 103 .
ReminderDate	Select an expiry reminder date to remind you that the listing is about to expire. For more information, see "Specifying Dates and Times" on page 103 .
Commission	Enter the commission as a percentage.
StopReminder	A check mark indicates that you want activity reminders for this listing to appear in Today's Activities .

- 5 Tap the **Statistics** tab to enter the listing's property statistics.

6 Tap the **Dimensions** tab to enter the listing's property-dimensions. Enter lengths in fields marked with an **L**; widths in fields marked with a **W**.

7 Tap the **Seller Parties** tab to view all associated sellers.

All associated sellers appear. The primary seller is marked as **Primary**. For more information, see ["Viewing Listing Sellers" on page 85](#).

8 When you are finished, tap **Save**.

You are returned to the *Listings* screen.

Note: If you want to change the listing's primary address and primary seller, you must do it from Top Producer 7i/8i.

Viewing Listing Sellers

Viewing Listing Sellers

To view all listing sellers:

- 1 Tap the **Listings** tab.
- 2 Select a listing, then select **Seller Parties** from the menu.

The *Associated Seller Parties* screen displays your currently listed sellers. The primary seller is marked with the word **Primary**.



About Frozen Listings

Types of Frozen Listings

Listings with the following status are considered **frozen** (either because you have manually changed the status or due to a linked closing):

- **Expired**
- **Withdrawn**
- **Cancelled**
- **Closed/Paid** (frozen only when not linked to closing)
- **Closed/Paid transferred**

When viewing a frozen listing, certain options will not be available. For example, with frozen listings only activities and notes can be modified.

Note: You can only modify a listing's status if the status is active (i.e. Active, Pending (showing), Pending (not showing), Pending/Firm or Pending/Backup).

Closings

In this chapter:

- *“About Closings” on page 88*
- *“Viewing a List of Current Closings” on page 89*
- *“Viewing Closing Details” on page 92*

About Closings

The closing record tracks the acceptance, closing and possession dates. It also tracks notes, closing parties, sale prices, commission information and more.

You can easily and effectively organize and track the closing's progress prior to the property's final sale. Your activities will automatically appear in **Today's Activities** as they come due. This gives you a reliable reminder of what you need to do each day.

Viewing a List of Current Closings

The **Closings** screen displays a list of your closings. You can view either all closings or closings with a particular status.

Note: Closings can only be created in Top Producer 7i/8i.

Summary of Closings Screen Menu Commands

The following table summarizes the menu commands available from the **Closings** screen. The rest of this section explains these commands in more detail.

Note: The menu commands shown correspond to the closing that has been selected.

Details	View the closing.
Activities	Activities linked to the closing.
Notes	Displays a list of notes linked to the closing.
Closing Parties	Displays the names of the closing parties.
Search	Search for a closing.
Filter By	Filter By All displays all closings. Filter By Closing Status displays closings that match a certain type (e.g. Pending (showing)).
Sort By	Sort closings by Full name, First Name or Last Name.
Cancel	Returns you to the setup screen.

Full Data Recovery	Initiates an over-the-air Full Data Recovery. This reloads your device with data from your Top Producer database. Make sure that you have performed a synchronization, as any pending changes on your device will be overwritten.
Synchronize Data	Initiates a synchronization with Top Producer. Changes to your Top Producer database will be synchronized with the device and changes to the device will be synchronized with your Top Producer database.
About	Displays the copyright and application version information.

Accessing the Closings screen

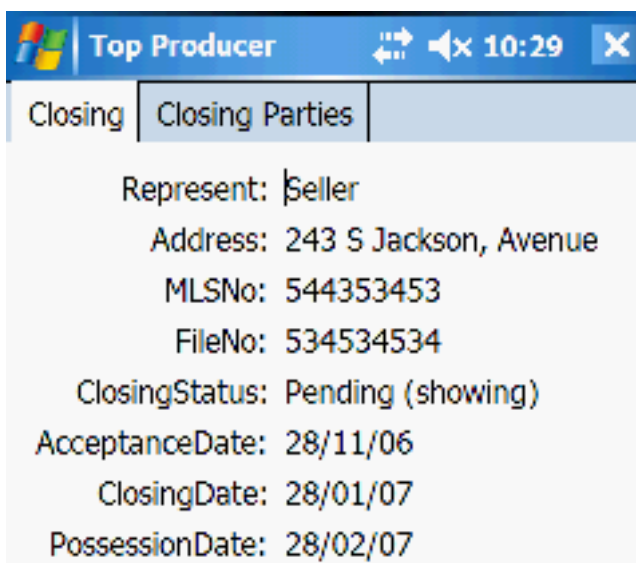
To access the *Closings* screen:

- 1 Tap the **Closings** tab.

The *Closings* screen appears.

- 2 To view a closing's details, select the record and then tap **Details**.

The *Closing Details* screen appears. For more information, see "[Viewing Closing Details](#)" on page 92.



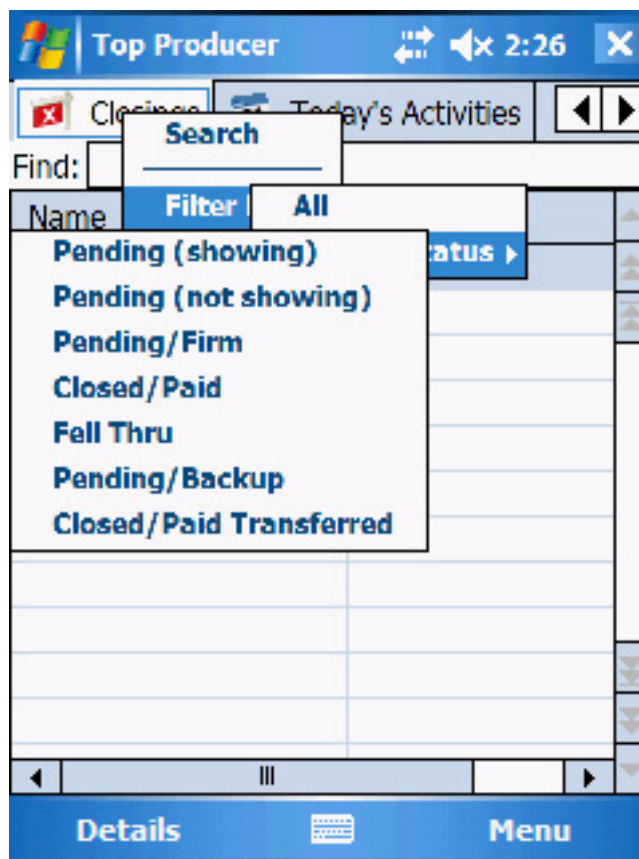
Viewing Closings by Status

To view closings by status:

- 1 From the **Closings** tab, select a closing.
- 2 From the menu, select the **Filter By** drop-down menu.

Note: You can also display this menu by tapping and holding the **Closings** tab.

- 3 Then from the subordinate **Closing Status** drop-down menu, select the status you want (e.g. **Pending**).



The closing's list will now display, showing only closings with the desired status.

Viewing Closing Details

From the *Closing Details* screen, you can view a closing's details and add or modify its notes and activities. The remainder of the closing's details must be modified in Top Producer 7i/8i.

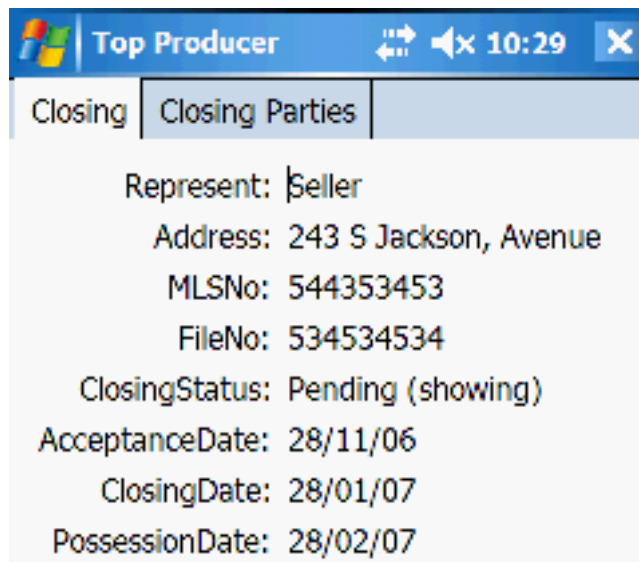
Note: Archived activities cannot be edited.

Viewing Closing Details

To view a closing's details:

- 1 Tap the **Closings** tab.
- 2 To view closing information, select a closing record and then tap **Details**.

The *Closing Details* screen appears.



- 3 Some of the fields displayed on this screen are:

Table 4: Closing Details Fields

Field	Description
Represent	Specifies the party you are acting for (i.e. seller, buyer, or both)
Address	Displays the address of the closing property.
MLSno	Displays the property's MLS number. This was assigned when the listing was first posted on an MLS board. This field will be blank if the property hasn't been listed on an MLS board.
FileNo	Displays the closing's file number. This is for your reference only.
ClosingStatus:	Displays the current status of the closing (e.g. Pending).
StopReminder	A check mark indicates that you want activity reminders for this listing to appear in Today's Activities .

- 4 To view the various parties to the closing, tap the **Closing Parties** tab.
- 5 To add or edit activities linked to the closing, select **Activities** from the menu. For more information, see *"Time Management" on page 61*.
- 6 To manage closing notes, select **Notes** from the menu. From there, you can use the menu to **add**, **edit**, or **delete** a note. For more information, see *"Managing Notes" on page 48*.
- 7 When you're finished, select **Close**.

Synchronization

In this chapter:

- *“About Synchronizing your Data” on page 95*
- *“Performing a Synchronization” on page 96*
- *“Viewing the Results of Synchronizing” on page 98*
- *“Synchronization and FDR Best Practices” on page 100*

About Synchronizing your Data

Synchronization technology ensures that any changes you make on your handheld (e.g. adding a contact) are transferred to your Top Producer 7i/8i database. It also makes sure that changes made in the Top Producer 7i/8i database are transferred to the handheld.

Even though your device doesn't have to be connected to your computer when you synchronize, you still need to initiate synchronization yourself (i.e. this process is not automatic). For more information, see ["Performing a Synchronization" on page 96](#).

Performing a Synchronization

Important synchronization Information

The following are some key pieces of information that you should keep in mind when synchronizing:

- 1 During synchronization, anyone else using your database (e.g. an assistant) will be logged out of Top Producer 7i/8i. They will, however, be able to log back in and save their data when the device synchronization has completed.
- 2 When you synchronize for the first time during a session, you will be asked for your username and password. If you later decide to synchronize without closing the application, you will not be prompted again for your username and password.

Note: We recommend that you keep Top Producer for Windows Mobile running all day, and then shut it down at the end of the day.

While it is running, you can access other applications (such as PowerPoint) from the **Start** menu. To return to Top Producer from another application, click the **Start** menu's Top Producer icon.

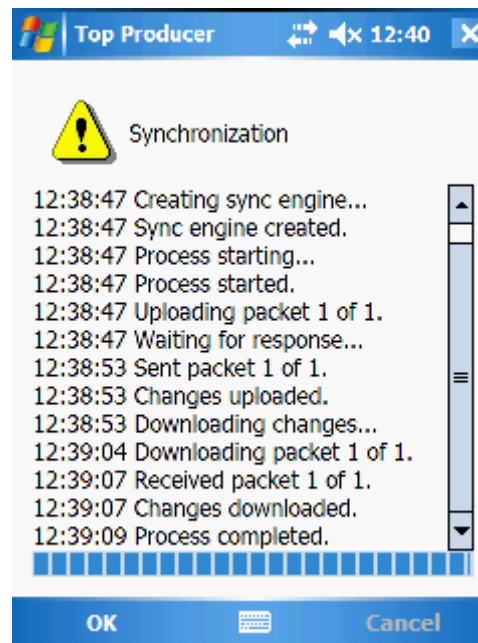
Synchronizing your Data

To synchronize your data:

- 1 Start up Top Producer for Windows Mobile.
- 2 From the menu, select **Synchronize Data**.

- 3 If prompted, enter your Top Producer 7i/8i username and password.

The synchronization process begins. Your handheld will display a series of messages ending with the message **Process Completed**.



Viewing the Results of Synchronizing

The Top Producer 7i/8i Synchronization log page displays the results of synchronizing your handheld device.

Viewing Synchronization Results from Top Producer 7i


To view synchronization results:

- 1 Log onto Top Producer 7i.
- 2 From the **Setup** menu, select **Applications setup > Top Producer 7i for Handhelds**.
- 3 Select the **View log** action item.
- 4 Select the device and time details you want included in the log:
 - a) Click the **Device#** pick list and select either a device number or accept **All**.
 - b) In the **Select events from** and **to** fields, specify a date range for the synchronization events you want to view.

Viewing Synchronization Results from Top Producer 8i

To view synchronization results:

- 1 Log onto Top Producer 8i.
- 2 From the Main menu, select **Mobility > Handhelds**, then select the **Sync Log** tab.

For assistance viewing the synchronization log, select the Help  icon.

Synchronization Process Stops Responding

Synchronization of your device with your Top Producer account can be performed in the following ways (depending on the model and the device's capabilities).

- 1 **Cradle Sync** - the device is connected to your computer via the USB cable.

- 2 **Over the Air** - the device is not connected to your computer. This method is available for **Pocket PC Phone Edition** devices that have data plans with the appropriate carriers.
- 3 **Wi-Fi** - the device is connected to a wireless local area network. This is available to devices with Wi-Fi support

When performing a synchronization, you should always allow it to complete before you change the connection type. However, if a change in connection type occurs during synchronization—e.g., you connect the device to your USB cable when an over-the-air synchronization is in progress—the process could stop responding. If this occurs, follow the steps below.

To recover from a halted synchronization:

- 1 If the synchronization process has stopped responding, click **Cancel** at the bottom right of the screen, then click **OK**. This cancels the current synchronization.
- 2 Re-attempt a synchronization by selecting **Synchronize Data** from the menu.
- 3 The new synchronization process will use the updated connection type and attempt a synchronization.
- 4 If the synchronization fails and displays the error **Remote side is unreachable**, make sure that your handheld is still connected, then retry the synchronization by repeating steps 2 and 3 above.

This time the synchronization should complete successfully.

Note: There is no data loss if synchronization is halted.

- 5 If the synchronization fails again, you can log into Top Producer 7i/8i to view the synchronization events for more information. For more information on viewing synchronization results, see [“Viewing Synchronization Results from Top Producer 7i” on page 98](#) or [“Viewing Synchronization Results from Top Producer 8i” on page 98](#).

Synchronization and FDR Best Practices

Synchronization Best Practices

- 1 Synchronize your data at least once a day.
- 2 Make sure that the synchronization completed successfully. If it displays a **Process aborted** message, retry the synchronization. If you continue to get this message, contact Top Producer Technical Support.

FDR Best Practices

- 1 Refresh your device's database by doing a **Full Data Recovery** (FDR) once every 3 to 6 months.
- 2 Before doing an FDR, make sure to synchronize any changes you've made on the handheld with Top Producer 7i/8i.
- 3 Make sure that the network signal is strong and steady. FDRs must have a steady signal for the duration of the process, which could take hours depending on the size of your database.
- 4 Do FDRs during off-peak time. Preferably in the early morning, evenings, or weekends.

Note: Make sure your device is sufficiently charged before attempting a data synchronization or FDR.

Miscellaneous

In this chapter:

- *“Some Terminology” on page 102*
- *“Specifying Dates and Times” on page 103*
- *“The Managing Your Handheld Settings in 7i/8i” on page 105*
- *“Uninstalling Top Producer for Windows Mobile” on page 106*

Some Terminology

Check Boxes

Check boxes are used to enable or disable an option, like an on/off switch. Tap the check box to either check (enable) it or clear (disable) it.

Calendar Icons

On some Top Producer for Windows Mobile screens you'll see a calendar icon next to a date field. Tap this icon to display a pop-up calendar. Tap a date on the calendar to enter it into the date field. To select a date from a different month, tap the arrows at the top of the calendar to scroll through the months.

Pick Lists

Some fields contain a pick list where you can select from commonly used items. Pick lists are useful for tasks such as entering new contacts.

Note: If you want to change the choices offered by a pick list, you must do it from Top Producer 7i/8i

Spin Buttons

Spin buttons appear next to some numeric text fields, enabling you to enter numbers quickly and easily. The spin buttons are small up and down arrows. Each tap on the up arrow increases the number; each tap of the down arrow decreases the number.

Drop-down Menus

Drop-down menus appear as menu entries with a right arrow next to the words. When you select one, a set of hidden entries is displayed.

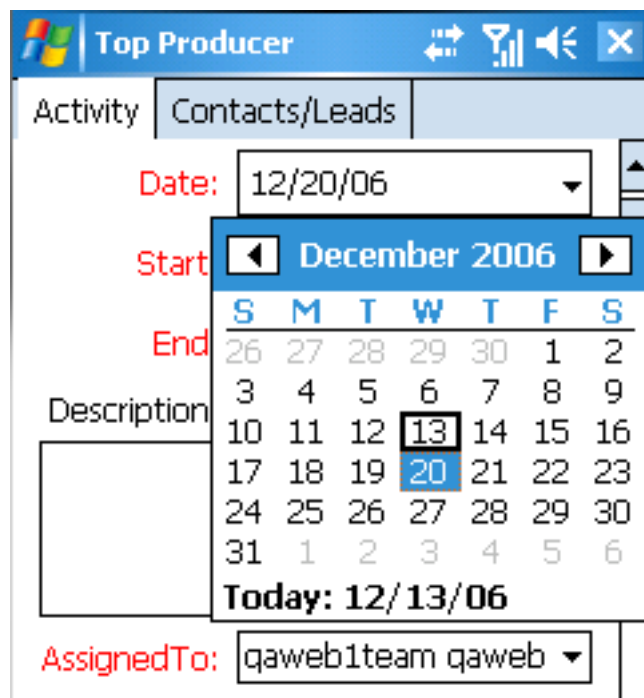
Specifying Dates and Times

Some fields require you to specify dates or times. For example, when scheduling a follow-up activity for a new lead.

To specify a date:

- 1 Tap the date's down arrow.

A calendar will appear.



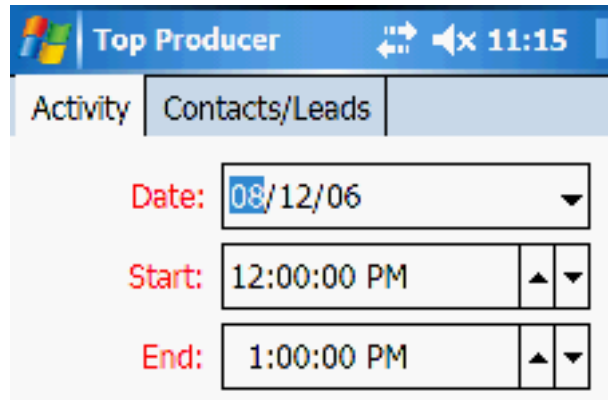
- 2 Tap the new date you would like to enter. Use the right and left arrows at the top of the calendar to change the month.

Note: The date is displayed as mm/dd/yy.

Specifying Times

To specify a time:

- 1 Times are split into three fields (hour/min/sec), with a fourth field indicating AM/PM. Tap the field you would like to change.
- 2 Next, tap the spin buttons until you get the desired value.



The Managing Your Handheld Settings in 7i/8i

Some aspects of managing your handheld device are only performed from within the 7i/8i online application.

In Top Producer 7i, these functions are located in the **Handheld manager**. The Handheld Manager is accessed by selecting **Setup > Applications Setup > Top Producer for Handhelds** from the Main menu.

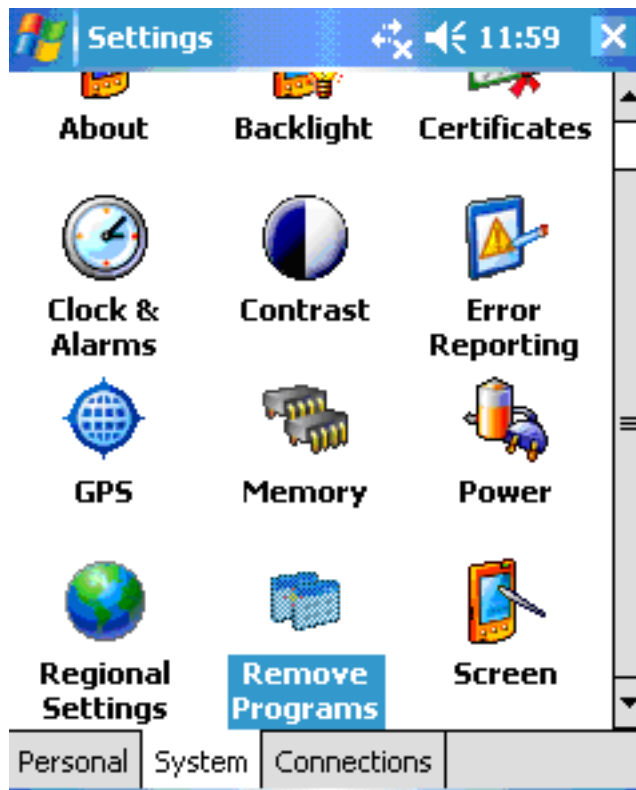
In Top Producer 8i, the manager is accessed by selecting **Mobility > Handhelds** from the Main menu.

The 7i/8i functionality allows you manage your assistants' handhelds, set up and manage filters, view synchronization results and more. See the online help system of either application for details.

Uninstalling Top Producer for Windows Mobile

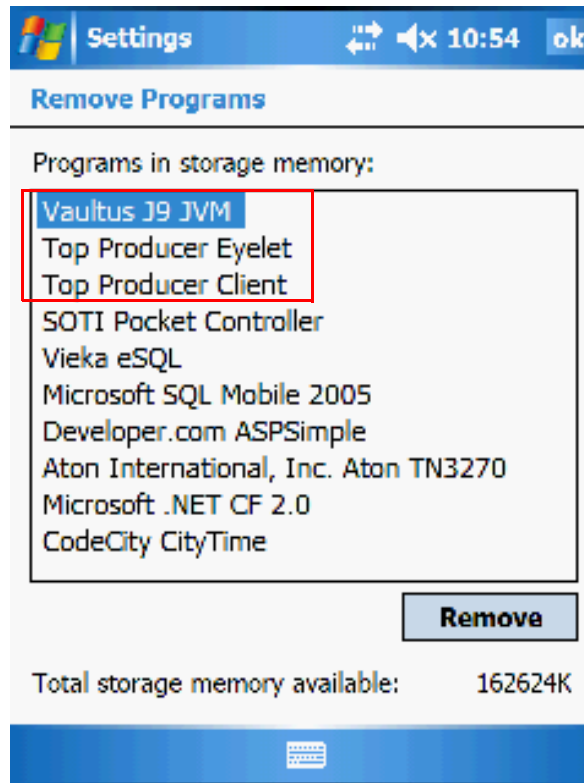
To uninstall Top Producer for Windows Mobile software:

- 1 From the main menu go to **Settings**. The *Settings* screen opens.



- 2 Select **System** then **Remove Programs**.

- 3 Remove the **Vaultus J9 JVM**, **Top Producer Eyelet**, and **Top Producer Client** programs one by one. When you are finished, click **OK**.



- 4 Once you have successfully uninstalled the above components delete the **Vaultus** folder from your device. Open File Explorer on the device, select the **Vaultus** folder and choose **Delete**.



Note: If you installed the Top Producer for Windows Mobile application onto the main device memory the location will be 'My Device\Vaultus'

- 5 If you installed the Top Producer for Windows Mobile application onto a storage card the location will be 'Storage Card\Vaultus'