Top Producer® 7i

Quick Setup

Top Producer 7i Quick Setup

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Trademarks

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Introduction

In this chapter:

What Is Top Producer 7i?

Welcome to Top Producer 7i, the most powerful and easy-to-use real estate sales productivity application in the business.

Top Producer 7i is an Internet-based application that offers a variety of features that will help you work more productively and with greater convenience. There is nothing to install; just access Top Producer 7i through your Web browser, or through your WAP-enabled mobile phone.

Top Producer 7i and all your data are safely stored on powerful servers, rather than on your local computer. Sophisticated backup and security systems ensure the safety of your data.

For a complete list of the new features available in Top Producer 7i, go to: http://www.topproducer.com.

Top Producer 7i System Requirements

- **Display:** Color palette: 16-bit color or greater
- **Viewing resolution:** 1024 X 768 (recommended)
- **Memory:** 128MB RAM (recommended); 64MB RAM (minimum)
- **Supported Internet browsers:** Internet Explorer 5.0 or higher (required)
- **Internet connection:** High speed cable, DSL, or other high bandwidth connection (recommended). This application will operate over any stable Internet connection. Performance can vary depending on the speed of the connection.

About This Guide

This guide was written to help you set up the basic features in Top Producer 7i so that you can start to use the program in as little time as possible.

Quick Setup:

- Provides you with information on how to access our other helpful references, including our online Help menu, the User Guide, and information on how to contact Technical Support for assistance.

- Shows you how to optimize your Internet Explorer settings so that you get the best possible performance while using Top Producer 7i.

- Shows you how to login, and provides you with an overview of the resources that are available from the Top Producer 7i login page.

  Note: One of the great new features on the Top Producer 7i login page is the link to our Top Producer 7i Training Clips. After you have setup Top Producer 7i, be sure to view our free online video training clips. These short video training clips will provide you with information on how to use the key features of Top Producer 7i.

- Introduces you to the Top Producer 7i Setup Wizard. When you first login to Top Producer 7i, the Setup Wizard will help you set up the basic features of Top Producer 7i, which include Agent setup, Email setup, and Data conversion.

  Note: Be sure to refer back to this guide if you need more detailed help setting up these features.

- Provides you with a handy resource to help you troubleshoot and resolve some common login issues. If you are not able to login, be sure to refer to

"Troubleshooting Common Issues" on page 67 for common issues and solutions.

Note: If you can't resolve an issue related to Top Producer 7i, do not hesitate to contact our toll-free Technical Support staff. They will get you up and running in no time!

About Portable Document Format (PDF)

Quick Setup is presented in Portable Document Format, and is viewed by 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**.)

Printing this user guide

1. From the Adobe Acrobat page, point to **File**, then click **Print**.

   The *Print* pop-up window opens.

2. Specify your print options, then click **OK**.

Saving this user guide to your hard drive

It is recommended to save Quick Setup to any directory on your hard drive. To view the guide in the future, double-click the saved file to open it in Adobe Acrobat.

Note: If you save Quick Setup to your hard drive, each time an update is made to Top Producer 7i, you will need to repeat these steps. This will ensure you have the latest version of the guide.

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1. Point to **File**, and then click either **Save as** or **Save a copy**, depending on what version of Adobe Acrobat you are using.

   The *Save As* or *Save a Copy...* dialog box opens.

To access the guide quickly, it is recommended to save it to your desktop.

2. Specify a folder and file name, then click **Save**.

   Now you can quickly access this user guide from its saved location whenever necessary.

Searching for specific information

You can automatically locate specific information by searching for key words, such as "technical support", "email", or "importing".

1. From the Adobe Acrobat toolbar, click the **Find** icon.
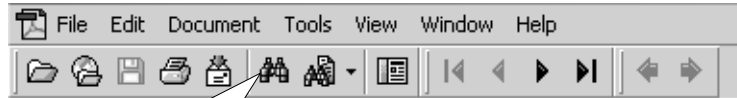
To search through this guide for specific information, click the **Find** icon.

The *Find* pop-up window opens.
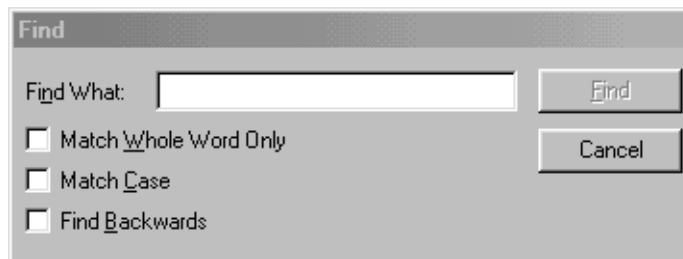
Another way to access the *Find* dialog box is to point to **Edit**, then click **Find.** You can also press **[Ctrl+F]**.

2. In the **Find What** field, type a key word. For example, if you're looking for browser information, type "browser".

3. Depending on your search preferences, select one or all of the check boxes.

4. Click **Find**.

Navigating within this guide

If you are reading this guide online, click any text that appears in blue to automatically jump to the specified section. For example, if you see: For more information, see *"About Email Setup" on page 32*, click the text that appears in blue (in this case, *"About Email Setup" on page 32*) to automatically jump to the section.

Additional materials

In addition to this guide, which was designed to get you up and running with Top Producer 7i in as little time as possible, the Top Producer 7i user guide provides in-depth documentation on all of Top Producer 7i's features.

To access the Top Producer 7i User Guide:

1. From the main menu in Top Producer 7i, point to **Help** and then click **Download user guides**.

   The *Download User Guides* topic opens.

2. Under the **Top Producer 7i** heading on the left side of the table, click **User Guide**.

   The Top Producer 7i User Guide opens.

How To Get The Most Out Of The Online Help

Top Producer 7i's Online Help contains all the information you'll need to navigate through the program.

Accessing the Online Help

From the main menu in Top Producer 7i, click **Help**, then click **Help topics**.

You can navigate through the Online Help by using the **Contents**, **Index** and **Search** buttons in the top left.

Finding a topic using Contents

Think of the **Contents** pane as the Online Help's table of contents. To view subtopics, click the plus sign next to a topic. The topic will expand to show the subtopics it contains.
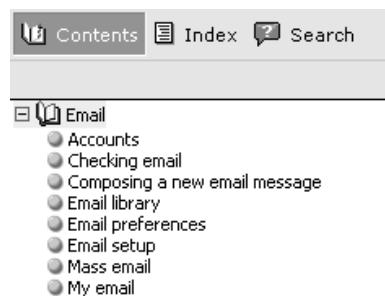
Finding a topic using the Index

Click the **Index** button in the top left. Enter the key word you're looking for in the text box (for example, "closings"). Click a topic to display details on the right.
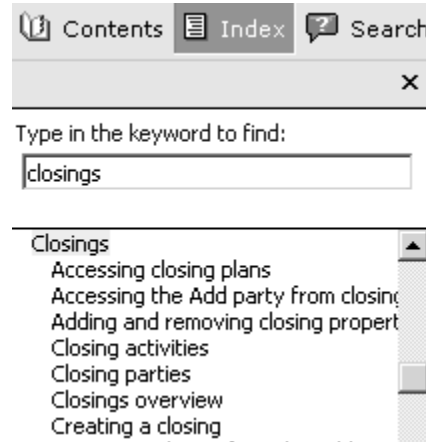
Searching for a topic

1. Click the **Search** button in the top left.

2. Enter a word or phrase in the text box (for example, "address book"), then click **Go**.

   All related topics that contain the word or phrase you entered appear in a list below.

3. Click a topic to display details on the right.

Printing a topic

It is recommended that you print any topics that are lengthy, complex or you may need to reference regularly.

1. Locate the topic you want to print, then click your cursor in the right pane where the topic is displayed.

Nothing will appear to happen but this action ensures that the topic pane is the one that is selected and will be printed.

2. Use the print feature of your Web browser — typically an icon on your toolbar or a **Print** command under the **File** menu.

Contacting Technical Support

You can contact a Technical Support representative from Monday - Friday, 6:00 AM - 5:00 PM (Pacific Time).

- **Toll-free**: 1.800.830.8300

- **Fax:** 604.270.6365

- **Email:** support@topproducer.com
  If you send email to support@topproducer.com, please include the following information:

  - your first and last name

  - your Top Producer 7i login name

  - a clear description of the type of help you need. If you are experiencing a problem, include a description of what you were doing when the problem occurred and include the text of any messages that appear.

To view product information and FAQs, go to www.topproducer.com.

Optimizing Your Browser Settings

In this chapter:

- *"How To Optimize Your Login Time" on page 16*

How To Optimize Your Login Time

Before your first login, it is highly recommended that you follow these steps to optimize your Internet Explorer settings. The changes made here will decrease the amount of time needed to log in.

To change your browser settings:

1. Make sure your browser is closed.

2. From your Windows desktop, click **Start**, highlight **Settings**, and then click **Control Panel**.

3. Double-click the **Internet Options** item from the list.

   If you are using Windows XP, you may need to click **Switch to Classic View** on the left side before this item will appear.
   The *Internet Properties* pop-up window opens.

4. Click the **General** tab.

5. In the **Temporary Internet files** section, click **Settings**.

   The *Settings* pop-up window opens.

6. Under the **Check for newer versions of stored pages** section, select the **Automatically** option button.

7. Click **OK** to exit the *Settings* pop-up window and return to the *Internet Properties* pop-up window.

8. Click the **Advanced** tab and scroll down to the **Security** section.

9. Ensure that the **Empty Temporary Internet Files folder when browser is closed** check box is <u>NOT</u> SELECTED. That is, the check box must be cleared.
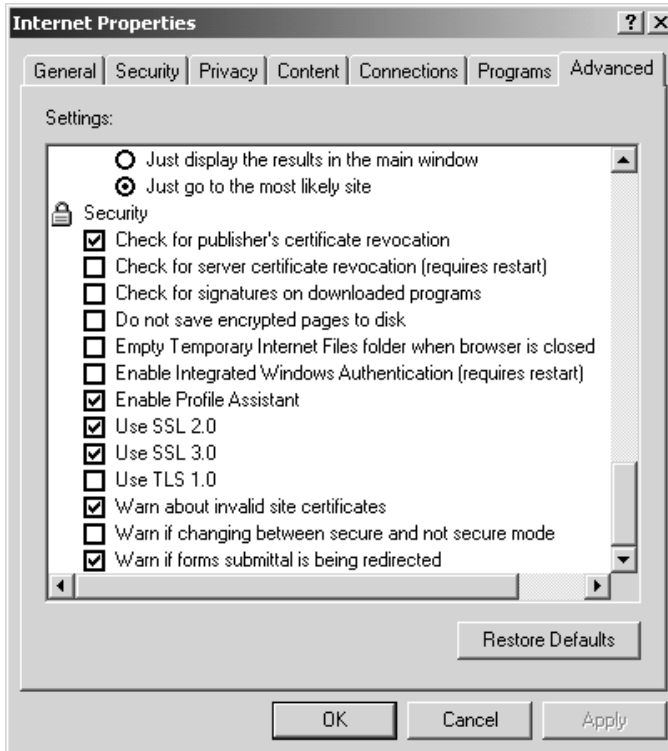
> **Note:** If you do not clear this check box, then the contents of the **Temporary Internet files** folder will be deleted when you close Internet Explorer. This will cause your next login to take longer because the files needed to operate Top Producer will be deleted and subsequently downloaded to your computer again.

10. Click **OK** to exit the *Internet Properties* pop-up window.

11. Close the *Control Panel* window.

Some functions in Top Producer 7i are dependent on the speed and quality of your Internet connection, among other factors. If you have problems logging in, or the program is performing slower than you believe it should, please see *"Troubleshooting Common Issues" on page 67* for some common solutions. If you need additional help, contact Top Producer Technical Support at 1.800.830.8300, as most login and performance issues can be easily resolved.

Getting Started

In this chapter:

The Top Producer 7i Login Page

The Top Producer 7i login page includes a variety of links designed to provide you with the very best customer support, so you get the most value from your sales productivity system. The login page gives you direct desktop access to the latest real estate industry news, the new Top Producer 7i Training Clips, the Hot Tips For Sales Success archive, video training clips, product updates, User Guides, FAQs, and more. You'll also find helpful information on how to contact our Training, Technical Support, Customer Service, and Sales departments.

Log into Top Producer 7i by entering your username and password.

Access today's Real Estate news, the new Top Producer 7i Training Clips, and the Hot Tips archive.

Learn what you can do with top Connector 7i.

Learn more about additional Top Producer products.

Access product updates, user guides and FAQs. Also find out how to contact us.

Logging In And Out Of Top Producer 7i

The following section tells you how to log in and out of Top Producer 7i. If you are experiencing login problems or you have forgotten you username and password, see *"Troubleshooting Common Issues" on page 67*.

Logging into Top Producer 7i

1. Open your web browser.

2. In the web browser's **Address** text box, type: https://www.topproduceronline.com, and click **Go**.

   The *Login* page opens.

3. Enter your username and password on the left side of the page.

   > **Note:** If you want the system to remember your username the next time you access Top Producer 7i, select the **Remember my username** check box. After you select this check box, the **Remember my password** check box becomes available. If you also want the system to remember your password, select the **Remember my password** check box.

4. Click **Login**.

5. If:

   - there are issues preventing you from logging in, the *Configuration issue [exists/detected]* page appears.

     Depending on the type of issue, the *Configuration issue detected* page may appear. Read the disclaimer information. To accept the disclaimer and follow on-screen instructions to resolve the

issue, select the **I have read and accept the terms of this agreement** option button, and then click **Next**.

From the *Configuration issue exists* page, you can either contact Top Producer Technical Support for assistance (see *"Contacting Technical Support" on page 14*), or follow the steps provided by clicking the **found here** link. If you've chosen to resolve the issue, follow the on-screen instructions.

- this is NOT your first time logging in, after a few moments, Top Producer 7i opens. See *"The Top Producer 7i Setup Wizard" on page 24* for instructions on working with the Setup Wizard, or refer to the appropriate section in this guide for information on how to set up a specific feature.

- this is your first time logging in and you purchased Top Producer 7i through the online store, the *Welcome to the Top Producer Setup Wizard* page opens. For more information on working with the Top Producer 7i Setup Wizard, see *"The Top Producer 7i Setup Wizard" on page 24*.

- this is your first time logging in and you did not purchase Top Producer 7i through the online store, the *Top Producer first time login* page opens, displaying the license agreement. Proceed to step 6.

6. Read the license agreement carefully. If you agree to its terms, select **I have read and accept the terms of this agreement**, then click **Next**. You won't be able to log into Top Producer 7i if you don't accept the license agreement.

7. Specify your time zone, birth date and zip code.

8. In the event that you lose your password, you must specify a secret question and answer in order to set a new one.

   To specify a secret question, either:

   - select a preset item from the **Secret question** drop-down list.

   - enter your own secret question by selecting the **Enter my own secret question** check box, then entering your question in the text box below.

9. Specify your secret answer in the **Secret answer** text box, then click **Next**.

The *Welcome to the Top Producer Setup Wizard* page opens. For more information on working with the Top Producer 7i Setup Wizard, see *"The Top Producer 7i Setup Wizard" on page 24*.

Logging out of Top Producer 7i

1. Click **Log out** from the main menu.

   The *Log out successful* page opens.

2. Click either the **Close** link or button.

Forget or Want to Change your Password?

If you forgot or want to change your password, you can create a new one. For security purposes, it is recommended that you frequently change your password. When you change your password, you will be required to enter some of your personal information and answer your secret password question.

Note: If you can't remember your username, contact Customer Service at 1-866-230-4789.

To retrieve or change your password from the login page:

1. On the Login page, click **Did you forget your password?**.

2. To verify your identity, enter your username, birth date and zip code.

3. Click **Next**.

   The next step appears, displaying your **Secret question**.

4. Enter your **Secret answer**.

5. Enter a new password in the **Password** and **Confirm password** fields.

Tip: Use a password that is at least 8 characters long and contains some letters, numbers, and other symbols (for example, asterisks, ampersands, pound signs).

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6. Click **Finish**.

   The *Password changed successfully* message appears.

7. Click **Continue** to return to the Login page.

The Top Producer 7i Setup Wizard

The Top Producer 7i Setup Wizard is designed to help you set up some key features in Top Producer 7i quickly and easily so that you can immediately begin using the program. Using the Top Producer 7i Setup Wizard, you can:

- specify agent information (see *page 26*)
- specify assistant information (see *page 28*)
- add agent and assistant pictures, as well as your company logo (see *page 30*)
- set up your email (see *page 32*)
- convert your desktop data or import data from a third-party application (see *page 38*)

When logging into Top Producer 7i for the first time, you will see the Welcome screen, as shown below.

Welcome to the TOP PRODUCER Setup Wizard!

- Welcome
- Agent setup
- Assistant setup
- Agent pictures setup
- Email setup
- Data transfer

Welcome!

Setting up TOP PRODUCER 7i is quick and easy! This wizard will guide you through a series of steps that will allow you to enter important information and import your existing database so that you can immediately begin using TOP PRODUCER 7i effectively.

For further instructions on setting up all of the screens in this wizard, download the 7i Quick Setup guide.

Click "Start" to begin. Or, go to a specific setup screen by selecting it from the action menu.

Either click **Start** from the control menu to let the wizard guide you through the set up process, or select an option from the action menu to set up a specific feature.

Start   Close

To:

- let the wizard guide you through the set up process, click **Start** from the control menu and then proceed to *"Setting Up Agent Information" on page 26*.
- set up a specific Top Producer 7i feature, select an option from the action menu, and then proceed to the appropriate section in this guide.

Agent, Assistant, and Company Details

In this chapter:

Setting Up Agent Information

It's important to enter as much information about yourself and your company as you can — including your agent photo and company logo, if you have them in digital format — so this information will automatically appear in any marketing material you send.

If you have an assistant, you should set up an assistant account as well. This requires an assistant license.

This section tells you how to specify your name, address and contact information, as well as other user settings.

To set up agent information:

> **Note:** If you are using the Top Producer 7i Setup Wizard, skip to step 2.

1. Point to **Setup** and then click **Agent setup**.

   The *Agent information* page opens.

2. Specify name details, address and contact information in the appropriate sections.

   > **Note:** The **First name**, **Initial**, and **Last name** for the agent are already filled in and cannot be edited.
   >
   > The **Email address** field in the **Contact information** section essentially allows you to direct email replies to the email address you specify.

3. Specify the office manager's name details in the **Office manager** section.

4. Type the signature you want to appear on outgoing mass email in the **Signature** section.

   • use the HTML editor toolbar to format selected text, cut and paste, insert pictures, hyperlinks or a horizontal line.

- use the links to insert a company logo, user photo, marketing link or to clear the signature.

For more information on purchasing additional Top Producer 7i licenses, see the Top Producer 7i User Guide.

5. Select the check box(es) corresponding to the additional Top Producer application(s) for which you hold licenses.

Additional TOP PRODUCER applications

☐ TOP PRODUCER 7i SellPhone ☐ TOP PRODUCER 7i for Palm handhelds ☑ TOP PRODUCER 7i Remote

6. Select your time zone from the **Time zone** drop-down list.

7. If:

- you are NOT using the Top Producer 7i Setup Wizard, click **OK**.

- you are using the Top Producer 7i Setup Wizard, click **Next**.

  If you have an assistant license, the *Setup wizard - Assistant setup* page opens. For information on specifying assistant information, see *"Setting Up Assistant Information" on page 28*.

  If you do NOT have an assistant license, the *Setup wizard - Agent pictures setup* page opens. For more information on adding images, see *"Adding Your Company Logo And Agent/Assistant Pictures" on page 30*.

Setting Up Assistant Information

This section tells you how to specify the name, address and contact information for an assistant. You must have an assistant license for this option to be available.

To enter assistant information:

Note: If you are using the Top Producer 7i Setup Wizard, skip to step 3.

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1. Point to **Setup** and then click **Agent setup**.

   The *Agent information* page opens.

2. Click **Assistants** from the action menu.

   The *Assistants* page opens.

3. Click **Create new**.

   The *Assistant information* page opens.

4. In the **Login information** section:

   - enter the assistant's login information (**Username** and **Password**).
   - select the check box(es) corresponding the additional Top Producer application(s) to which you want to grant access.

Note: Separate licenses are required for each user. You cannot share a license between an agent and an assistant.

   - select **Give this assistant access to create an email mailbox** to allow your assistant to set up their own email account.
   - select **Give this assistant access to Agent schedule** to grant your assistant access to your schedule.

5. In the **Data export and deletion settings** section, specify if you want the assistant to be able to export and delete data:

   • Select **Allow this assistant to export data from Top Producer 7i** if you want the assistant to be able to export contact information (including all associated properties), listings, closings, referrals and leads.

   • Select **Allow this assistant to delete data from Top Producer 7i** if you want the assistant to be able to delete contact information (including all associated properties), listings, closings, referrals and leads.

6. In the **Name details** section, enter the assistant's name, title and designation.

7. In the **Contact information** section, enter the assistant's phone numbers, pager, and email address.

8. In the **Signature** section, type the signature you want to appear on the assistant's outgoing email.

To learn more about using the HTML editor toolbar, see the Top Producer 7i User Guide.

   • use the HTML editor toolbar to format selected text, cut and paste, insert pictures, insert a hyperlink or a horizontal line.

   • use the links to insert a company logo, insert a user photo, insert a marketing link or clear the signature.

9. Click the **Time zone** drop-down list and select the appropriate time zone for your assistant.

10. If you are part of a team or partnership account, select the agent that the assistant primarily works for from the **Default agent** drop-down list.

11. If:

   • you are NOT using the Top Producer 7i Setup Wizard, click **OK**.

   • you are using the Top Producer 7i Setup Wizard, click **OK**, and then click **Next** to proceed with the next step of the wizard.
   The *Setup wizard - Agent pictures setup* page opens. For more information, see *"Adding Your Company Logo And Agent/Assistant Pictures" on page 30*.

Adding Your Company Logo And Agent/Assistant Pictures

This section tells you how to add agent and/or assistant pictures, as well as your company logo. Note that pictures you want to add must be in .JPG or .JPEG format.

To add images:

> **Note:** If you are using the Top Producer 7i Setup Wizard, skip to step 3.

1. Point to **Setup** and then click **Agent setup**.

   The *Agent information* page opens.

2. Click **Agent or assistant pictures** from the action menu.

To remove a picture, select the picture you want to remove by using the **<<Previous** and **Next>>** links, and then click **Remove.** The *Remove picture* dialog box opens**.** Click **Yes.**

3. To add a picture:

   • in the **Agent or assistant picture** or the **Company logo** section, click **Add**.
     The *Select picture* pop-up page opens.
   • use the **Look in:** drop-down list to select where the file is saved.
   • find and select the graphic file you want to attach, then click **Open**.

> **Note:** Use the **<<Previous** and **Next>>** links to view any other pictures you have added.

4. If:

   • you are NOT using the Top Producer 7i Setup Wizard, click **OK**.
   • you are using the Top Producer 7i Setup Wizard, click **Next**.
     The *Setup wizard - Email setup* page opens. For information on setting up your email, see *"About Email Setup" on page 32*.

Setting Up Email

In this chapter:

About Email Setup

Before you can use the My email feature in Top Producer 7i, you need to set up your email account. There are three different ways you can use the My email feature. These are:

- using existing POP3 external account(s)
- using the @topproducer.com domain
- using your email program

Carefully review the three options and choose the option that best suits your needs. Once you've determined the email option that you are going to use, continue to *"Setting Up Email Accounts" on page 34* for details on how to set up your email in Top Producer 7i.

Using existing POP3 external accounts in Top Producer 7i

This option will allow you to receive email from all your business or personal email accounts into your Top Producer 7i My email Inbox, so you'll never have to switch between Top Producer 7i and other email programs again. Choose this option if you would like to manage these other email accounts in Top Producer 7i.

> **Note:** This option only allows you to add POP3 email accounts — NOT web-based accounts such as AOL, Hotmail, or Yahoo.

Using the @topproducer.com domain

This is a free service included with your Top Producer 7i subscription that will allow you to set up an email account in the @topproducer.com domain. If you choose this option, which is not mandatory, any outgoing email that you send from Top Producer 7i will display your Top Producer email address (i.e., [your username]@topproducer.com) in the recipient's Inbox. In addition to setting up a Top Producer account, you can also set up any of your external accounts and manage them via Top Producer 7i's My Email feature. To learn more about setting up external email accounts, see the Top Producer 7i User Guide.

Using your current email program

Choose this option if you do NOT want to read and reply to email using Top Producer 7i's My email feature, and want to continue using your current third-party email application.

This option prevents you from using the My email feature in Top Producer 7i to read and send email. However, you can still use the other features in Top Producer 7i which rely on an email address. For example, you will be able to email flyers, send mass email, and receive email reminders for scheduled appointments. You can use these email features in Top Producer 7i as long as you have an email address specified in Agent setup. For more information on setting an email address, see *"Setting Up Agent Information" on page 26*.

Setting Up Email Accounts

You can set up My email to use the @topproducer.com domain, existing POP3 external accounts or, if you have another email program you would rather use, you can choose to NOT use My email. If you are not sure which of the three options you should choose, see *"About Email Setup" on page 32* for a description of each option. Once you have decided on an email option, refer to the appropriate section below.

After specifying your email settings, you may update these settings at any time by accessing the *Email preferences* page from the **Email** menu. To learn more about modifying your original email settings, see the Top Producer 7i User Guide.

Note: In order for an assistant to access the email feature in Top Producer 7i, email access must have been granted when the assistant's account was created. For more information on giving an assistant email access, see *"Setting Up Assistant Information" on page 28*.

I want to use existing POP3 email accounts:

To set up your Top Producer 7i email feature to manage external POP3 accounts, follow these steps:

Note: If you are using the Top Producer 7i Setup Wizard, skip to step 2.

---

1. From the main menu, point to **Setup**, **Preferences**, then click **Email**.

   The *Email configuration* page opens.

2. Select the **I want to set up My email to receive messages from my POP3 accounts** option.

3. If you are:

   • using the Top Producer 7i Setup Wizard, skip to step 4.

- not using the Top Producer 7i Setup Wizard, click **OK**. The *Add a new account* page opens. Proceed to step 4.

4. Specify the following:

- **POP3 server** — type the name of the POP3 server.
- **Port** — type the port number, if required.
- **Username** — specify your username.
- **Password** — specify your password.

Note: If you do not have this information, please contact your email service provider. You can add this information later from the *Accounts* page. To learn more about adding account information later, see the Top Producer 7i User Guide.

- **Move to folder** — by default, email from your POP3 server is placed into the My email - Inbox. If you want your email to be placed into a different folder, select it from the drop-down list.
- **Only get new mail** — select this check box if you want to download only new email messages from the POP3 server.
- **Leave mail on server** — select this check box if you want to leave your email messages on the POP3 server after you have downloaded them.

5. If you are:

- using the Top Producer 7i Setup Wizard, click **Next**. The *Setup wizard - Data transfer* page opens. For information on transferring your data, see *"Importing Data Into Top Producer 7i" on page 38*.
- NOT using the Top Producer 7i Setup Wizard, click **OK**.

I want to use an email account in the @topproducer.com domain:

To set up a Top Producer email account, follow these steps:

Note: If you are using the Top Producer 7i Setup Wizard, skip to step 2.

---

1. From the main menu, point to **Setup**, **Preferences**, then click **Email**.

   The *Email configuration* page opens.

2. Select the **I want to use my @topproducer.com email address** option.

3. Specify a **Username** of your choice.

4. If:

   • you are using the Top Producer 7i Setup Wizard, click **Next**.

   • you are NOT using the Top Producer 7i Setup Wizard, click **OK**.

   The *Email setup* dialog box opens confirming the successful set up of your new email address.

5. Click **OK**.

   All outgoing email will appear in the recipient's inbox with the email address [your username]@topproducer.com. If you want a different address to appear, change the email address in Agent setup. For more information on setting an email address, see *"Setting Up Agent Information" on page 26*.

   If you are using the Top Producer 7i Setup Wizard, the *Setup wizard - Data transfer* page opens. For information on transferring your data, see *"Importing Data Into Top Producer 7i" on page 38*.

I do not want to send and receive email using the My email feature:

If you have no intention of using the @topproducer.com email address, follow these steps:

> **Note:** If you are using the Top Producer 7i Setup Wizard, skip to step 2.

1. From the main menu, point to **Setup**, **Preferences**, then click **Email**.

   The *Email configuration* page opens.

2. Select the **I do not want to use the My email feature** option.

   You will still be able to send flyers and other correspondence from Top Producer 7i and any outgoing email will display the email address you have specified in Agent setup. For more information on setting an email address, see *"Setting Up Agent Information" on page 26*.

3. If you are:

   • using the Top Producer 7i Setup Wizard, click **Next**. The *Setup wizard - Data transfer* page opens. For information on transferring your data, see *"Importing Data Into Top Producer 7i" on page 38*.
   • NOT using the Top Producer 7i Setup Wizard, click **OK**.

Importing Data Into Top Producer 7i

In this chapter:

Converting Your Top Producer Desktop Data

The information and steps outlined in this section describe the process of converting your Top Producer System 6 or 6i desktop data into Top Producer 7i. If you are not converting data from a desktop version of Top Producer, but want to import data from third-party programs or other data files, please proceed to *"Importing Data From Third-Party Programs" on page 55*.

The *Top Producer Data Conversion Wizard* is a utility that is easily saved onto your computer desktop so that you can convert your existing Top Producer desktop database(s) into Top Producer 7i.

What data is converted?

The following data will be converted:
- Contacts, addresses, properties, history, and notes
- Contact and property pictures, and maps (converted to .jpg format)
- Listings
- Closings
- Action Plans (excluding attachments)
- Activities (excluding attachments)
- Leads (agent created)
- Referrals
- Pick lists
- Letters
- Income and expense data
- Buyer/seller net sheets
- Scheduled Service Reports (service report activities, service report options, and service report comment library)
- Service Report plans

Preparing for a full Top Producer desktop data conversion

Before performing a full data conversion of your Top Producer desktop data, you should ensure the following key preparations have been made:

- If you have an assistant account in your Top Producer desktop database, you must create a Top Producer 7i account for your assistant using the <u>exact same first and last names</u>
- Synchronize all Remote computers and handheld devices
- Back up your desktop database
- If you are using Microsoft Windows 2000, you need to install at least Service Pack 2 or later

(A) Activities That Are Assigned To Assistants

If you are converting activities (to-dos, appointments, etc.) for an assistant, you must create a Top Producer 7i account for the assistant <u>before</u> converting your data. If this is not done, all activities previously assigned to the assistant will be reassigned to the agent.

If you have assistant accounts in your Top Producer desktop application:

> **Note:** If you are using the Top Producer 7i Setup Wizard, click **Previous** from the control menu until you see the *Setup wizard - Assistant setup* page.

1. To create an assistant in Top Producer 7i, highlight **Setup**, then click **Agent setup**. From the *Agent setup* page, click **Assistants** from the action menu. If you have already created assistant accounts, they will appear on the *Assistants* page, (see *"Agent, Assistant, and Company Details" on page 25*).

2. Click **Create new** from the action menu and complete the fields.

> **Note:** You must ensure that the online assistant first and last names (located in the **Name details** section of the *Assistant information* page) <u>exactly</u> matches the assistant's Top Producer desktop application login name. Otherwise, the activities will not be properly assigned after the conversion. For more

information, see *"Setting Up Assistant Information" on page 28*.

3. Click **OK** when you have finished.

(B) Synchronize all Remote computers and handheld devices

It is vital to synchronize as advised, otherwise the data currently stored on Remote computers and handheld devices will not be available in Top Producer 7i.

- To consolidate all of your data in one location, please synchronize your database changes from each Remote computer to the Master computer, before you convert your data into Top Producer 7i.
- If you have a handheld device(s) running Top Producer for Palm Computing Connected Organizers, you should HotSync your handheld device(s) to the Top Producer Master computer, before you convert your data into Top Producer 7i.

For detailed instructions on how to synchronize your Remote computers, or HotSync your handheld device(s), refer to your Top Producer User Guide and/or Top Producer for Palm Computing Connected Organizers (TPP) User Guide.

Once you have synchronized all of your Remote data to the Master computer, verify that the data on the Master is correct and up-to-date.

(C) Back up your database

The backup operation should be performed on the Master computer once you have synchronized all of your Remote computers and your handheld devices (if applicable). We recommend that you make a backup of your Top Producer database to removable media (floppy diskettes, CD-R/RW, ZIP disks or similar), and to your local hard drive. For detailed instructions on how to perform a backup of your database, please refer to your Top Producer System 6 or 6i User Guide.

(D) Microsoft Windows 2000 users

If you are using Microsoft Windows 2000, you must have at least Service Pack 2 installed to be able to convert Top Producer desktop data. Check which version of Windows 2000 you have installed and, if applicable, go to the Microsoft Windows 2000 Web page at http://www.microsoft.com/Windows2000 and download and install Service Pack 2 or later.

Note: Top Producer does not accept responsibility for any operating system issues that may be caused by installing third-party products such as Service Pack 2.

Saving the *Top Producer Data Conversion Wizard* to your Desktop

Once you have completed the preparatory steps described in *"Preparing for a full Top Producer desktop data conversion" on page 40* proceed as follows to download and install the *Top Producer Data Conversion Wizard* to your desktop.

Note: If you are using the Top Producer 7i Setup Wizard, skip to step 2.

---

1. Complete the following:

   - Close all open applications, including your Top Producer desktop application, and log into Top Producer 7i.

   - From the main menu, point to **Setup**, then click **Data transfer/conversion** and **Convert my Top Producer desktop data**.

   - When the *Data Conversion from Top Producer Desktop* dialog box appears, click **OK**. Skip to step 3.

2. From the *Setup Wizard - Data transfer* page:

   - Select the **Top Producer 7i Data Conversion Wizard** check box.

   - Click **Close** from the control menu.
     The *Close setup wizard* dialog box opens.

   - Click **Yes** to exit the wizard.
     The *Data Conversion from Top Producer Desktop* dialog box opens.

   - Click **OK** to download the *Top Producer Data Conversion Wizard*. Proceed to step 3.

3. From the *File Download* pop-up window:

   - click **Save** (or, **Save this program to disk** and click **OK**) to save the conversion program to your hard drive.
     The *Save As* pop-up window opens. Proceed to step 4.

- click **Open** to save the program to a temporary folder. Proceed to *"Performing a full data conversion for first time users" on page 43*.

4. Click the **Save in** drop-down list and choose the directory in which you want to save the **TP Data Conversion.exe** file (it is recommended that you save it on your **Desktop**), then click **Save**.

5. When the file download is complete, close the *Download complete* dialog box.

6. If you are not using the Top Producer 7i Setup Wizard, click **Log out** from the Top Producer 7i main menu to close the program.

Note: If prompted, click **OK** to restart your computer.

Performing a full data conversion for first time users

If you are a new user and need to convert your Top Producer desktop database(s) into Top Producer 7i for immediate use, follow the instructions in this section.

If you have already attempted to convert your Top Producer desktop database and have not received a "Successful conversion" email, or you cancelled the conversion process after it had begun, or the conversion failed, please contact Top Producer Technical Support for assistance. A Technical Support representative will ensure that your data is properly converted for use in Top Producer 7i.

To perform a full database conversion:

For information on setting up Top Producer for Palm Handhelds, Top Producer SellPhone, or top Connector 7i, see *"Converting multiple Top Producer desktop databases" on page 47*.

Note: The data conversion process can take considerable time to complete if you have a large database, and you will not be able to use Top Producer 7i during this process. It is recommended that you perform the data conversion process when you will not be using your computer (or Top Producer 7i) for a little while.

---

1. Ensure that you have taken the preparatory steps necessary before converting your Top Producer desktop database.

   For more information, see *"Preparing for a full Top Producer desktop data conversion" on page 40*.

2. Once you have downloaded the **TP Data Conversion.exe** file to your desktop, double-click

the icon to install and open the *Top Producer Data Conversion Wizard*.

Double-click this icon to install and open the *Top Producer Data Conversion Wizard*.

Note: If the *Top Producer Data Conversion Wizard* does not start automatically, double-click the **TP Data Conversion.exe** icon on your desktop. If the conversion is cancelled or interrupted, you can start it again by double-clicking the **Top Producer Data Conversion Wizard** icon. If the process is successful, you may delete this second icon.

The *Welcome to the Top Producer Data Conversion Wizard* page is displayed.

3. Click **Next**.

Note: If any assistants are detected in your Top Producer desktop application, you will see the *Assistants detected* window <u>before</u> you see the *Top Producer Desktop login* window. This window advises you that if you have assistants in your Top Producer desktop application who have activities assigned to them, the activities will be reassigned to the agent if the assistant accounts are not created first in Top Producer 7i. If this applies to you, and you have not created the assistant accounts in Top Producer 7i, cancel the data conversion, and log in to Top Producer 7i. To create the assistants, point to **Setup** and click **Agent setup**. From the *Agent setup* page, click **Assistants** from the action menu. Then, run the *Top Producer Data Conversion Wizard* again. Otherwise, click **Next** to proceed.

---

4. Use the *Data Conversion Wizard - Top Producer desktop login* window to select the agent whose Top Producer desktop application database(s) you want to convert. Choose an agent name from the **Agent name** drop-down list. If the agent has a password, type it in the **Password** field, otherwise leave it blank and click **Next** to proceed.

5. If you have multiple desktop databases, the *Select database(s) to convert* window is displayed. Choose the database(s) you want to convert from the **Database names** box. Hold down the **[Ctrl]** key to select multiple databases. Click **Next**.

> **Note:** If you have a single desktop database, the
> *Select database(s) to convert* window will
> NOT be displayed.

6. In the *Data Conversion Wizard - Top Producer 7i
   login* window, type in your Top Producer 7i
   Username and **Password** and click **Next**.

> **Note:** If you have previously converted a Top
> Producer desktop database that included the
> newest features, and select it again, the
> *Data Conversion was successful* dialog box is
> displayed. This is a safeguard to prevent the
> duplication of your data, and so you will not
> be able to convert the same database a
> second time. Click **<Back** to de-select the
> previously converted database, select a
> different database, then click **Next>** to
> proceed.

> **Note:** If you have previously tried to convert your
> data and the conversion failed, or you
> cancelled the conversion process once it had
> begun, you will see the *Data conversion
> recovery* window. If this scenario does not
> apply to you, skip to step 8.

7. If you see the *Data conversion recovery* window,
   refer to the following options:

   - If you have entered data into your Top Producer
     desktop database since your previous data
     conversion attempt, select **Start the data
     conversion process over again from the
     beginning**, and click **Next**. Skip to step 8.

   - If you have not entered data into your Top
     Producer desktop database since your previous
     data conversion attempt, select **Retransmit my
     converted data to Top Producer Online**, then
     click **Next**. Skip to step 8.

> **Note:** If you have not entered an email address in
> Top Producer 7i Agent setup, the
> *Appointment reminder email address*
> window is displayed. If you want your
> appointment reminders to be successfully
> converted to Top Producer 7i, enter an email
> address in the text box. If you do NOT want
> your appointment reminders to be

converted, leave the email address text box blank. Click **Next** to continue.

8. The *How do you want to convert your data?* window is displayed with the following options:

    *   Perform a full conversion of my Top Producer desktop database
    *   Only convert data for new features recently added to Top Producer 7i

    If you are a new user who has <u>never</u> converted the Top Producer desktop database for use in Top Producer 7i, select the **Perform a full conversion of my Top Producer desktop database** option, then click **Next**.

    WARNING!

    If you have previously converted your Top Producer desktop database for use in Top Producer 7i, <u>DO NOT</u> select **Perform a full conversion of my Top Producer desktop database**, or your data will be <u>duplicated</u>.

    To convert only your Top Producer desktop data for the <u>new</u> features now available in Top Producer 7i, select **Only convert data for new features recently added to Top Producer 7i**. Click **Next** to continue.

    Selecting this option will convert only the following data from your Top Producer desktop version: Income and Expenses, Buyer/Seller Net Sheets, Service Report options, Service Report plans and the Service Report Comment library for use in Top Producer 7i. Your current Top Producer 7i data will <u>not be duplicated</u>.

9. Enter your personal email address (<u>NOT</u> your email address for Top Producer 7i) in the *Data Conversion Wizard - Conversion notification email address* window, then click **Next**.

    Note: Make sure that your email address is correct since an initial email will be sent to you advising you that the data conversion has begun, and then a second email will be sent when the data has been successfully converted.

10. Your data will begin uploading to Top Producer 7i in preparation for conversion.

    The *Data Conversion Wizard - Converting your data* window will display the progress of the data upload. If

you have a large Top Producer database, this may take a while.

Note: You must <u>NOT</u> run the *Top Producer Data Conversion Wizard* again, or log in to Top Producer 7i until you have been notified by email that the data has been successfully converted. Otherwise, you may lose the data you are currently working on.

---

11. When the data upload is finished, click **Close** in the *Data transmitted successfully* dialog box. Now that your data has been uploaded to Top Producer, it will be placed in a queue awaiting conversion.

Note: The time required to convert your data will depend on a number of factors. It may be as short as one hour, but you should allow up to 24 hours. If you do not receive an email within 24 hours stating that the conversion was successful, then contact Top Producer Technical Support to find out the status of your conversion. Once you have converted your data into Top Producer 7i, you should <u>NOT</u> continue to use your Top Producer desktop application.

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12. You may log in and begin using Top Producer 7i <u>after</u> you have received an email notification advising you that the data conversion is successful.

Converting multiple Top Producer desktop databases

This section is an overview of how multiple databases are handled in Top Producer 7i.

The Top Producer desktop application permits creation of multiple databases. In contrast, Top Producer 7i utilizes a single database, where contacts are organized by "contact type."

If you are converting multiple Top Producer desktop databases, they will be combined into one database in Top Producer 7i. For identification purposes, a unique **Contact type** consisting of the Top Producer desktop database name will be automatically applied to the contacts from each respective database.

For example, if you have two databases in desktop Top Producer, one named "database1", and the other named "farm prospects", after the conversion the contacts from each database will have the Contact types "database1" and "farm prospects" assigned to them, respectively.

To locate these contacts in Top Producer 7i, perform a search by Contact type, and select the database name (for example,

"farm prospects") as your search criteria. For information on using the search feature, see the Top Producer 7i User Guide.

Converting Your Online Software Data

The term "Online Software" will be used throughout this section to refer to these three products: Online Agent, Agent 2000 and AgentOffice.

The *Online Software Conversion Wizard* converts your Online Agent, Agent 2000 (version 3) and AgentOffice (version 6) data into Top Producer 7i.

Using the *Online Software Conversion Wizard*, you can convert your:

- contact and property information
- listing and closing information
- action, listing and closing plans and activities
- scheduler activities
- letter library

This section tells you how to:

- complete the necessary steps before converting your data (see below).
- download the *Online Software Conversion Wizard* (see).
- run the conversion program (see).

Preparing for the Online Software conversion

Before converting your data from Online Software into Top Producer 7i, you should ensure that you:

- optimize your Online Software database by running the "Re-index All" and "Pack All" functions. For more information on performing these functions, see your Online Software documentation.
- perform the conversion on the SAME computer that the Online Software is installed on.
- close ALL programs BEFORE running the *Online Software Conversion Wizard*. While the conversion is running, do NOT open any other programs on your computer. Therefore, you should ensure that you perform the conversion at a time when you will not need to use your computer.

Saving the *Online Software Conversion Wizard* to your desktop

Once you have taken the necessary steps to prepare for the conversion (see *page 49*), follow these steps to download the *Online Software Conversion Wizard*.

> **Note:** If you are using the Top Producer 7i Setup Wizard, skip to step 2.

1. Complete the following:

   - Log into Top Producer 7i.

   - From the main menu, point to **Setup**, **Data transfer/conversion**, and then click **Convert my Online Software data**.
     The *Data Conversion from Online Software Program* dialog box opens.

   - Click **OK**.
     The *File Download* pop-up window opens. Skip to step 3.

2. From the *Setup Wizard - Data transfer* page:

   - Select the **Top Producer 7i Online Software Conversion Wizard** check box.

   - Click **Close** from the control menu.
     The *Close setup wizard* dialog box opens.

   - Click **Yes** to exit the wizard.
     The *Data Conversion from Online Software Program* dialog box opens.

   - Click **OK** to download the *Online Software Conversion Wizard*. Proceed to step 3.

3. If:

   - you have downloaded the *Online Software Conversion Wizard* before, click **Open** to open the wizard. Skip to *"Converting your data", on page 51.*

   - this is your first time downloading the *Online Software Conversion Wizard*, proceed to step 4.

4. To save the installation file to a location on your hard drive, complete the following:

- Click **Save**.
  The *Save as* pop-up window opens.

- From the **Save in** drop-down list, specify the directory where you want to save the **TP Online Software Conversion.exe** file (it is recommended that you save it on your **Desktop**).

- Click **Save**.

The file is saved to the location you specified.

5. Click **Close** on the *Download Complete* dialog box.

6. If you are not using the Top Producer 7i Setup Wizard, click **Log out** from the Top Producer 7i main menu to close the program.

7. If prompted, click **OK** to restart your computer.

Converting your data

Depending on the size of your Online Software database, the conversion process can take considerable time to complete. Therefore, it is recommended that you perform the conversion at a time when you will not need to use your computer.

To convert your Online Software data into Top Producer 7i:

1. Ensure that you have completed the steps outlined in the *"Preparing for the Online Software conversion"* section.

2. Close all programs, and then double-click the **Online Software Data Conversion Wizard** icon on your desktop.

   The *Online Software Conversion Wizard* opens.

3. Read the information on this window, and then click **Next**.

4. If:

   - you have NOT entered an assistant in the Online Software application, the *Top Producer 7i login* window opens. Skip to step 5.

   - you have entered an assistant in the Online Software application, the *Assistants detected* window opens. This window advises you that if you have assistants in your Online Software application who have activities assigned to them, the activities will be reassigned to the agent if the assistant accounts are not created first in Top Producer 7i.

If this applies to you, and you have not created the assistant accounts in Top Producer 7i, cancel the data conversion, and log in to Top Producer 7i to create the assistant records. Then, run the *Top Producer Data Conversion Wizard* again.

Otherwise, click **Next** to proceed.

5. Enter your Top Producer 7i **Username** and **Password** in the appropriate fields, and then click **Next**.

6. If you:

   - have never converted your Online Software data, skip to step 8.

   - have already converted your Online Software database successfully, to avoid duplication, you will not be able to perform the conversion again. The *Data conversion was successful* window will appear, telling you that your database has already been converted. Click **Close**.

   - recently ran the *Online Software Conversion Wizard* and your data is still being converted, the *Data conversion is in progress* window will appear. Click **Cancel** to close the wizard.

   - previously tried to convert your data and the conversion failed, or you cancelled the conversion once it had begun, the *Data conversion recovery* window will appear. Proceed to step 7.

7. From the *Data conversion recovery* window, select:

   - **Retransmit my converted data to Top Producer 7i** if you have NOT entered data into your Online Software database since your previous conversion attempt. Click **Next**.

   - **Start the data conversion process over again from the beginning** if you have entered data in your Online Software program since your previous conversion attempt. Click **Next**.

8. If:

   - there are NOT multiple users set up in the Online software application and Top Producer 7i, skip to step 9.

   - there are multiple users set up in both applications AND there are activities that are assigned to these

users, the *Match Online Software activities to 7i users* window appears.

To assign these activities to the appropriate user, select the activity, then select the user from the **7i Users** column, and then click the **Add** arrow. Repeat these steps until all activities are assigned to the appropriate user, and then click **Next**.

9. If:

    • you have entered your email address in Top Producer 7i Agent setup, proceed to step 10.

    • you have not yet entered your email address in Top Producer 7i Agent setup, the *Top Producer 7i email address* window opens. Enter your email address and then click **Next**.
      The *Conversion notification email address* window opens.

10. In the *Conversion notification email address* window, enter an email address other than your Top Producer 7i email address. Ensure you enter your email address correctly, since email notifications will be sent to this address to inform you about the status of your conversion.

11. Click **Next**.

    Your data will begin uploading to Top Producer 7i in preparation for the conversion. The *Converting your data* window appears, displaying the progress of the data upload.

12. When the data upload is finished, click **Close** on the *Data transmitted successfully* window. Now that your data has been uploaded to Top Producer 7i, it will be placed in a queue awaiting conversion.

    The time required to convert your data will depend on a number of factors. It may be as short as one hour, but you should allow up to 24 hours. If you do not receive an email within 24 hours stating that the conversion was successful, then contact Top Producer Technical Support to find out the status of your conversion (see *"Contacting Technical Support" on page 14*).

    > **Note:** Do NOT log into Top Producer 7i or run the *Online Software Conversion Wizard* again until you have been notified of a successful conversion.

Once you have converted your data into Top Producer 7i, you should NOT continue to use your Online Software program.

13. After you have received an email notification advising you that the data conversion was successful, you may log in and begin using Top Producer 7i.

Note: Any data that could not be converted into a specific field due to data type inconsistencies will be placed into the relevant **Notes** field of the contact record.

Importing Data From Third-Party Programs

The .CSV format is a recognized industry standard supported by most programs, so it is likely that you will be able to export your data in this format.

The *Top Producer Data Transfer Wizard* is an easy-to-use tool that is designed for users with varying levels of computer skills. However, if at any time during the process you have difficulty importing your data into Top Producer 7i, please contact Top Producer Technical Support for assistance (see *"Contacting Technical Support" on page 14*).

The *Top Producer 7i Data Transfer Wizard* allows you to import data from a number of common programs and other data sources. The only requirement is that the data must be saved in a "comma-separated-values" (.CSV) format prior to import.

Using the *Top Producer 7i Data Transfer Wizard*, you can import data from the following programs:

Top Producer System 6 or 6i

If you want to convert your Top Producer System 6 to 6i desktop database into Top Producer 7i, see *"Converting Your Top Producer Desktop Data" on page 39*.

Agent 2000, Online Agent or AgentOffice

If you want to convert your ENTIRE Online Software database into Top Producer 7i, see *"Converting Your Online Software Data" on page 49*. However, if you only want to import certain contacts from your Online Software application, continue with the data import instructions below.

ACT!, Goldmine, Maximizer, Prep 3 or PowerPak

If you are importing data from one of these programs, it is recommended that you contact Top Producer Technical Support for further assistance. Certain procedures are required to ensure that your data is imported correctly into Top Producer 7i.

All other programs (i.e. Outlook, Top Recruiter, Hot Marketer, custom .CSV data files)

For all other programs, such as Outlook, Top Recruiter, Hot Marketer, or for a custom .CSV file, continue with the data import instructions below.

Exporting your data in CSV format

A comma-separated values file (.CSV) is a simple file that is readable by virtually any database or spreadsheet program.

Before you begin using the *Top Producer 7i Data Transfer Wizard*, you need to export your data into a .CSV file format. For more information on how to export your data, see your third-party application's documentation.

> **Note:** For ease of use it is recommended that you save the .CSV file on your Desktop.

Downloading the *Top Producer 7i Data Transfer Wizard*

You are now ready to download and install the import program.

> **Note:** If you are using the Top Producer 7i Setup Wizard, skip to step 2.

1. Complete the following:

   - Log into Top Producer 7i.

   - From the main menu, point to **Setup**, **Data transfer/conversion**, and then click **Import data**.
     The *File Download* pop-up window opens. Skip to step 3.

2. From the *Setup Wizard - Data transfer* page:

   - Select the **Top Producer 7i Data Transfer Wizard** check box.

   - Click **Close** from the control menu.
     The *Close setup wizard* dialog box opens.

   - Click **Yes** to exit the wizard.
     The *Data Conversion from Top Producer Desktop* dialog box opens.

   - Click **OK** to download the *Top Producer Data Conversion Wizard*. Proceed to step 3.

3. Click **Save** (or **Save this program to disk**) and click **OK**.

   The *Save As* pop-up window opens.

4. Click the **Save in** drop-down list and choose the directory in which you want to save the **TP Data Transfer.exe** file (it is recommended that you save it on your **Desktop**), then click **Save**.

5. When the file download is complete, close the *Download complete* dialog box.

6. If you are not using the Top Producer 7i Setup Wizard, click **Log out** from the Top Producer 7i main menu to close the program.

Double-click this icon to install and open the *Top Producer 7i Data Transfer Wizard*.

TP Data Transfer.exe

7. Double-click the **TP Data Transfer.exe** icon to install and open the *Top Producer 7i Data Transfer Wizard*.

Note: If prompted, click **OK** to restart your computer.

Using the *Top Producer 7i Data Transfer Wizard* to import your data

To import your data using the *Top Producer 7i Data Transfer Wizard*, complete the following steps carefully.

Step 1 of 9

1. From the list of programs displayed, select the program that the contacts were exported from. For example, select **Outlook 2000 CSV file** if your exported data file is from Outlook 2000.

2. If your program does not appear in the list, select **.CSV file**.

3. Click **Next**.

Step 2 of 9

4. Type your Top Producer 7i **Username** and **Password** in the text boxes, then click **Next**.

Step 3 of 9

5. Select the source data file that you want transferred into Top Producer 7i.

   a) Click **Browse** to display the *Select the file to transfer* pop-up window.

   b) Click the **Files of type** drop-down list and select **.CSV** or **.TXT**.

   c) Click the **Look in** drop-down list and navigate to the location of the exported .csv or .txt file on your computer. Select the file and click **Open**.

The selected file and its path appear in the **Select data file** section.

d)Click **Next**.

Step 4 of 9

Mapping defines how data in your source file will be imported into Top Producer 7i. For example, fields must be mapped correctly to ensure that your contact's first name is mapped to the **First name** field in Top Producer 7i and won't accidentally appear in the address field.

The Data Transfer Wizard's Field Mapping Utility allows you to map and import most data files with relative ease. However, if you have a complex data file or are not comfortable with the mapping procedures, please contact Top Producer Technical Support for further assistance (see *"Contacting Technical Support" on page 14*).

6. If you selected:

- a source program from the list (i.e., Outlook 2000, Prep, etc.), the mapping settings will be automatically defined. Do NOT change these settings. However, you should still review the mapping settings to verify that the data is mapped properly. Use the scroll bar in the **Map these values** list on the left to review the values stored in each contact record. Use the **Previous** (◀) or **Next** (▶) arrows located below the **Map these values** list to review the subsequent contact records.
  If the data appears to be mapped correctly, click **Next**.

- the **.CSV file** option, you will need to manually map your data. For more information on how to map your data, see *"Mapping data from an imported CSV file" on page 61*.

Step 5 of 9

You should now assign a unique contact type to the contacts being imported. This will allow you to locate these contacts, and even edit or delete these contacts in the event the data was not properly mapped prior to the import. If you do not assign a unique contact type to the records now, it may be difficult to locate and then edit or delete these contacts later.

7. To assign a contact type, select one or more contact types from the list, then click **Assign**.

You can also type directly into the **Contact types** field. Any contact type you enter manually will be added to the list of Top Producer 7i contact types, and you can search for this group in Top Producer 7i using the Quick search feature.

If you do not know what to enter in the **Contact types** field, we suggest you use the word

"Imported" along with the current date. For example, "Imported_Sept_18_2004".

Note: When entering multiple contact types, separate each type with a comma [,]. You should limit any symbols and punctuation to only the most common ones. As well, remember to NOT use the comma unless it is being used to separate multiple contact types.

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8. Click **Next** once your contact type(s) have been assigned.

Step 6 of 9

9. A grid displays all the information that will be imported into Top Producer 7i. Verify that the data is correctly mapped to the respective Top Producer 7i data fields, by comparing each column's header with the data contained directly underneath it. For example, make sure that first name, last name, address, etc. appear in the correct fields.

Note: If it appears that the data is NOT correctly mapped, make a note of which fields are incorrect and click **Back** twice to return to the mapping process. Then refer to the *"Mapping data from an imported CSV file" on page 61* topic for information on how to correctly map import fields.

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10. If the data is mapped correctly, click **Next**.

Step 7 of 9

11. Enter your personal email address (not your email address for Top Producer 7i), then click **Start**.

It may take some time to import your data into Top Producer 7i. During this time, you won't be able to log in to the program until the import is successful. When it is safe to access your data in Top Producer 7i, you will be sent an email confirming the data import was successful.

Caution: If you perform the data import process multiple times, your imported contact information will be duplicated in Top Producer 7i. Any contacts in the imported data that are already in your

Top Producer 7i database will also be
duplicated.

Step 8 of 9

12. The *Data transfer in progress* window displays the
progress of sending your data to Top Producer 7i.

> **Note:** If you click **Cancel** to cancel the data
> transfer, no data will be imported.

Step 9 of 9

13. When the data transfer is complete, click **Finish**.
When the data has been successfully imported into
Top Producer 7i, you will be sent an email advising
that the import process is finished. At that time, you
can log in to Top Producer 7i and review the data
you have imported to ensure it was successful.

Mapping data from an imported CSV file

The .CSV format is a recognized industry standard supported by most programs, so it is likely that you will be able to export your data in this format.

The *Top Producer 7i Data Transfer Wizard* allows you to import data from a number of common programs and data sources. The only requirement is that the data must be saved in a "comma-separated values" (.CSV) format prior to import.

When you import a .CSV file, you must specify which data values in your data file correspond to which data fields in Top Producer 7i. This is known as field mapping. For example, you will need to map the contact's first name in your data file to the **Primary person First name** field in Top Producer 7i.

1. When the map settings window is displayed (*"Step 4 of 9"* of the wizard), each record in your data file will be displayed as a unique record in the **Map these values** list on the left, as shown below. In the example below, everything displayed in the **Map these values** list is associated with the contact record named "Kelly Agent". The scroll bar in the **Map these values** list allows you to scroll up or down to view all of the values associated with this particular contact record.
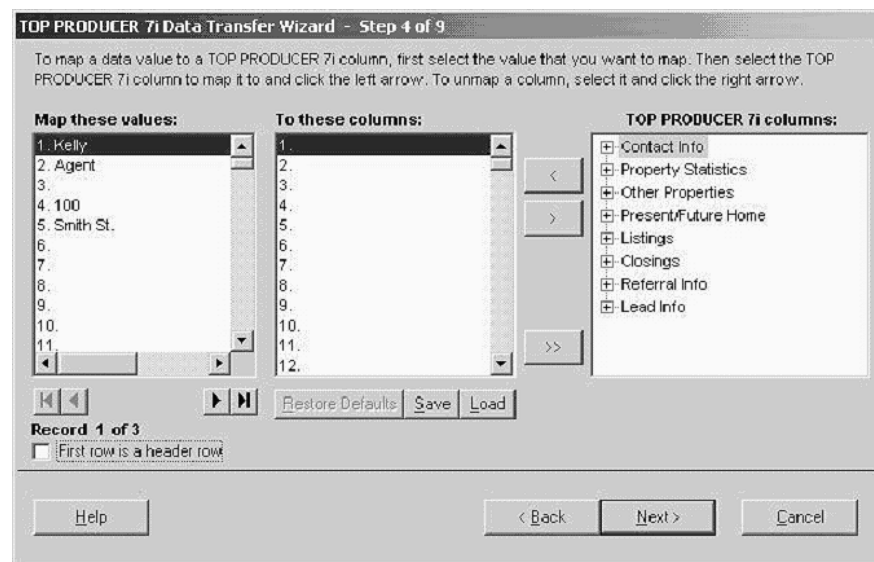
Note: If the first record displayed in the **Map these values** column contains "header values", such as PriFName or HomePhone, instead of the contact data, this is normal. In this case, select the **First row is a header row** check box. Then, click the right arrow below the **Map these values** column to display the next record in your data file.

2. Carefully examine each data value displayed in the **Map these values** list on the left. You will have to match each value in this list to a Top Producer 7i field name in the **To these columns** list in the center.

3. In the **Map these values** list on the left, highlight a value you want to map. Then, from the **To these values** list in the center, highlight the blank space that is next to the value you selected in the first list. For example, if you highlighted row 2 in the left list, then also highlight row 2 in the center list. The line you highlight in the center list is now ready to accept a Top Producer 7i field name.

4. From the **Top Producer 7i columns** list on the right, click [**+**] and [**-**] to expand and collapse the categories. When you find the field name that corresponds to the data value you highlighted in the **Map these values** list on the left, click the left arrow [**<**] to add the field to the **To these columns** list in the center.

5. Repeat steps 3 and 4 until all the values you want to import have been mapped to their matching field names, as shown in the example below.
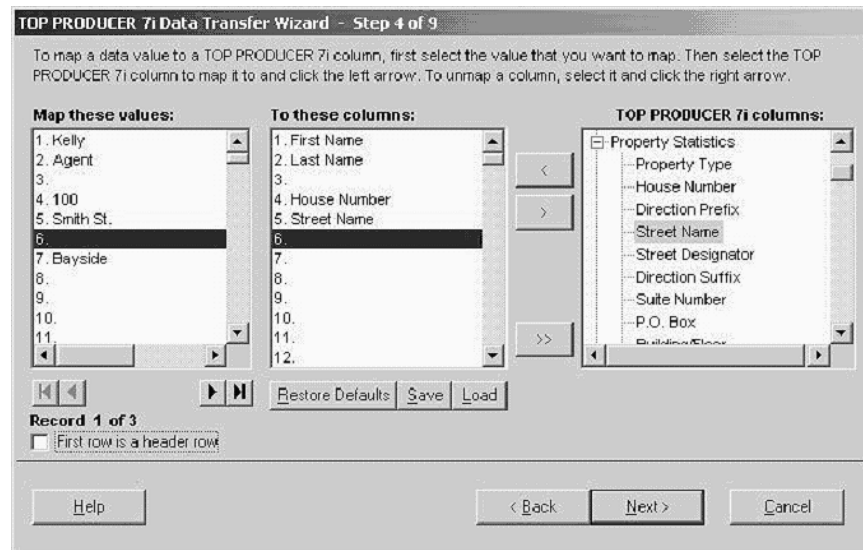
6. Review these points about the mapping process:

   • If there are values in the left hand list you do not want to import, leave the matching row in the **To these columns** list in the center blank. Any value that does not have a matching field name beside it will not be imported. In the example above, the

value "Bayside" will not be imported because it has not been matched to a Top Producer 7i field name.

- If you want to un-map a value, highlight the field name in the **To these columns** list, and then click the right arrow [**>**].
  This will remove the field name from the **To these columns** list in the center, which will ensure that the value is not imported into Top Producer 7i.

- If you want to clear all the mapping settings you have made and redo the mapping process, click the double-right arrow [**>>**].

7. Scroll through the records in the file you are importing from, clicking the **Previous** (◀) or **Next** (▶) arrows located below the **Map these values** list. It is a good idea to review a few of the records to make sure the mapping is consistent from record to record.

8. If in the future you plan to import additional data files of the same type, then you should save the mapping settings so that they can be reused. To do this:

   a) Click **Save**. The *Save As* pop-up window opens.

   b) Click the **Save in** drop-down list and choose the directory in which you want to save the mapping settings.

   c) Enter a name in the **File name** text box. Your settings will be saved as a .TXT file.

   d) If you later want to import more data of the same type, click **Load**. The *Open* pop-up window opens. Navigate to the saved .TXT file, and click **Open**. Your saved settings will be loaded.

9. When you are finished mapping all of the desired values, click **Next**. You will be returned to () of the *Top Producer 7i Data Transfer Wizard* to continue the import process.

Using Top Producer 7i Peripheral Applications

The four peripheral applications that you can use with Top Producer 7i are listed below. Please note that in order to use any of these applications, you will require a license for that product.

Top Producer 7i Remote

If you will be using Top Producer 7i Remote, see Top Producer 7i Remote Quick Setup for installation and set up instructions.

The four steps to setting up and installing Top Producer 7i Remote are to:

- assign a Top Producer 7i Remote license from Top Producer 7i
- download the installation file
- install Top Producer 7i Remote
- download your Top Producer 7i data into Top Producer 7i Remote

Top Producer for Palm Handhelds

If you will be using Top Producer for Palm Handhelds, see Top Produceri for Palm Handhelds Quick Setup for installation and set up instructions.

The steps to setting up and installing Top Producer for Palm Handhelds are to:

- assign a Top Producer for Palm Handhelds license from Top Producer 7i
- perform a HotSync test
- download and install Top Producer for Palm Handhelds

top Connector 7i

If you will be using top Connector 7i, see Top Connector Quick Setup for set up instructions. No installation is required to use top Connector 7i. However, before you can import comparable property information from a Multiple Listings Service (MLS)

board, you must set up your connection to one or more MLS boards.

Top Producer SellPhone

For instructions on how to set up the basic hardware and connection requirements for Top Producer SellPhone, see Top Producer SellPhone Quick Setup.

You do not have to install or set up anything in Top Producer 7i in order to start using Top Producer SellPhone. However, there are some basic hardware and connection requirements that must be set up:

- You must own a subscription to Top Producer SellPhone
- You will need a WAP-enabled mobile phone
- Your cellular provider must support the wireless Internet

You may need to sign up for an Internet cellular account. Please contact your cellular provider for information on Internet-enabled mobile phones and Internet cellular accounts.

Troubleshooting

In this chapter:

- *"Troubleshooting Common Issues" on page 67*

Troubleshooting Common Issues

The Troubleshooting section describes common issues that arise while using Top Producer 7i. If this section does not contain a solution to your problem, contact Top Producer Technical Support (see *"Contacting Technical Support" on page 14*).

The following issues are addressed in this section:

- Consistently slow login times, or the *Security Warning* screen appears at every login, prompting you to download and install Top Producer 7i (see *page 68*).
- You click **Login** and nothing happens (see *page 69*).
- The *Loading, please wait* screen never disappears, or you log in and only a grey screen appears (see *page 70*).
- You forgot your username or password (see *page 71*).
- You are having login problems because you changed your Internet Explorer settings (*page 72*).

Table 1: Troubleshooting Common Issues

Symptom	Cause of problem	How to correct it

Consistently slow login times, or
 	
The *Security Warning* screen appears at every login, prompting you to download and install Top Producer 7i
		1. Close all open programs, including Internet Explorer.
		
		2. Click **Start**, then point to **Settings**, and then click **Control Panel**. If you are using Windows XP and the Category view is currently displayed, click the **Network and Internet Connections** link.
		
		3. Select **Internet Options**, then click **File**, and then click **Open**.
		
		4. Click the **Content** tab.
		
		5. In the **Certificates** section, complete the following:
		
		  • Click the **Publishers** button.
		
		  • Select **Top Producer Systems Inc.** in the **Trusted publishers** list, then click **Remove**. Repeat this step to remove all instances of **Top Producer Systems Inc.** from the list.
		
		  • Click **OK** to return to the *Internet Properties* window.
		
		  • Click **OK** to return to the Control Panel.
		
		  • Exit the Control Panel by clicking **File**, then **Close**.
		
		6. Log into Top Producer 7i. The *Security Warning* pop-up window opens.
		
		7. Ensure the **Always trust content from Top Producer Systems Inc.** check box is selected, then click **Yes**. The login should continue normally and you should see that subsequent logins are significantly faster.

Symptom	Cause of problem	How to correct it
You click Login and nothing happens.	In most cases, a "pop-up blocker" program causes this issue. Pop-up blockers often come bundled with search toolbars or browser management software packages, and might be running on your system without your knowledge. Their function is to disable the pop-up advertising that many web sites use. However, they can also disable the legitimate functions of buttons and links within Internet Explorer and Top Producer 7i.	1. From the Top Producer 7i login page, enter your username and password in the appropriate fields. 2. Hold down the left **[CTRL]** key on your keyboard and at the same time click **Login**. 3. If you still cannot login, at the top of the Internet Explorer window click **View**, then point to **Toolbars**. The items installed by Internet Explorer are: **Standard Buttons**, **Address Bar**, **Links**, **Lock the Toolbars**, and **Customize**. Any other items that appear in this list have been added by third-party software. Disable these items by clicking them to remove the check mark. To confirm that you have removed an item, click **View** and point to **Toolbars** to ensure the check mark is gone. 4. Retry logging in. If the problem persists, contact Top Producer Technical Support (see *"Contacting Technical Support" on page 14*).

Symptom	Cause of problem	How to correct it
The *Loading, please wait* screen never disappears, or **You log in and only a grey screen appears.**	These issues are caused by a conflict between the Microsoft and Sun Microsystems versions of the Java application. Java is relied on by Internet-based programs such as Top Producer 7i. If both versions of Java are installed on the same system, a conflict can occur.	You will need to disable the Sun Microsystems Java application. Currently, Top Producer 7i only supports the Microsoft version of Java, although support for both versions of Java will be available in a future version. If you have other third-party Internet-based applications on your computer that require Sun Java, you may need to enable Sun Java after closing Top Producer 7i, and before starting the third-party application. To enable Sun Java, repeat the following steps but at step 4 select the **Microsoft Internet Explorer** check box and click **Apply**. 1. Click **Start**, point to **Settings**, and then click **Control Panel**. If you are using Windows XP, click **Start** then click **Control Panel**. 2. Click the icon that reads **Java Plug-in 1**. If you are using Windows XP and do not see this icon, click the **Switch to Classic View** link on the left side. 3. Click the **Browser** tab. If this tab is not available, proceed to the **No Browser tab** section below. 4. Clear the **Microsoft Internet Explorer** check box, then click **Apply**. 5. Close the *Java Plug-in* window, and log into Top Producer 7i. **No Browser tab** If you could not complete the above steps because the **Browser** tab was not present, you can upgrade Sun Java to version 1.4.x or higher, which will allow you to disable the Sun Java plug-in as described above. To upgrade your version of Sun Java, go to http://java.sun.com/j2se/downloads.html. Please note that Top Producer Systems advises that you proceed cautiously if you choose to upgrade your version of Sun Java.

Symptom	Cause of problem	How to correct it
You forgot your username or password		**Did you forget your password?** Access the reset password page by browsing to https://www.topproduceronline.com and clicking the **Did you forget your password?** hyperlink. You can also contact Customer Service at 1-866-230-4789. **Do you want to change your password?** For security purposes, it is recommended that you frequently change your password. You should use passwords that are not easily discovered. For example, use a password that contains some letters, numbers and other symbols (for example, asterisks (*), ampersands (&), pound signs(#)), and is at least 8 characters in length. To change your password, access the reset password page by browsing to https://www.topproduceronline.com and clicking the **Did you forget your password?** hyperlink. **Did you forget your username?** If you can't remember your username, contact Customer Service at 1-866-230-4789.

Symptom	Cause of problem	How to correct it

You are having login problems because you changed your Internet Explorer settings.	Top Producer 7i is designed to work with Internet Explorer 5.0 or later, using the default browser security settings. If you change these settings, Top Producer 7i may not work correctly.	**To set the default settings in Internet Explorer 5.0:**
		
		1. Open Internet Explorer.
		2. Click **Tools**, then click **Internet Options**.
		3. Click the **Security** tab.
		4. Click **Internet zone**.
		5. Select a security level other than **High**, or click **Custom Level**, scroll to the **Cookies** section, and then click **Enable** for both cookie options.
		6. Click the **Advanced** tab.
		7. Scroll to the **Security** section, and then select all of the **"Use SSL..."** check boxes.
		8. Make sure the **Do not save encrypted pages to disk** check box is NOT selected, then click **Apply**, and then click **OK**.
		
		To set the default settings in Internet Explorer 6.0:
		
		1. Open Internet Explorer.
		2. Click **Tools**, then click **Internet Options**.
		3. Click the **Privacy** tab.
		4. Make sure the **Settings slider** is NOT set to **Block all cookies**.
		5. Click the **Advanced** tab.
		6. Scroll to the **Security** section, and then select all of the **"Use SSL..."** check boxes.
		7. Make sure the **Do not save encrypted pages to disk** check box is NOT selected, then click **Apply**, and then click **OK**.
		8. If you see a message notifying you that:
		  • a web site is trying to send you a cookie when you try to log in, you should choose to continue or you will not be able to log in.
		  • you are entering or leaving a secure connection when you try to log in, you should choose to continue or you will not be able to log in. If you are behind a firewall or proxy that does not support secure connections (for example, if you are accessing the Internet from a computer that is part of a corporate network), speak with your local system administrator to see if a solution can be reached using your network. Note that not all firewalls or proxies cause errors.