Top Producer for BlackBerry
User Guide

Trademarks

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Getting Started

In this chapter:

What is Top Producer for BlackBerry?

Top Producer for BlackBerry 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.

Wireless 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.

> **Note:** Since Top Producer for BlackBerry is a data-intensive application, it is recommended that you subscribe to a BlackBerry Email and Internet Plan with high or unlimited access to avoid high data charges.

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 10*).

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 9*
- *"Performing Carrier Configuration" on page 7*

System Requirements

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

Handheld Memory

- Minimum 64 MB recommended

Computer operating system

- Windows 2000, XP, or Vista

Internet browser

- Internet Explorer 5.0 or higher
- Top Producer 8i-related functions require Internet Explorer 7.0 or Firefox 2.0

BlackBerry Desktop Manager

- BlackBerry Desktop Manager 4.1 or higher

Handheld operating system

- BlackBerry OS 4.0.2 or higher

Supported Devices

The following devices are supported:
- BlackBerry Bold
- BlackBerry Pearl
- BlackBerry Pearl Flip
- BlackBerry Curve 8300
- BlackBerry Curve 8900
- BlackBerry 7130e
- BlackBerry 8700 Series
- BlackBerry 8800 Series
- BlackBerry Storm

> **Important:** Since Top Producer for BlackBerry is a data-intensive application, it is recommended that you subscribe to a BlackBerry Email and Internet Plan with high or unlimited access to avoid high data charges.

Performing Carrier Configuration

Before installing Top Producer for BlackBerry, you must make sure that your handheld is configured appropriately for the carrier you are using.

For T-Mobile or Cingular

To configure if your carrier is T-Mobile or Cingular:

1 From the BlackBerry's main screen, select **Options** (i.e. click on the key icon).

2 Next select **Advanced Options**, then **TCP**.

   a) For **T-Mobile** users, enter the following:

   APN: wap.voicestream.com
   Username: < leave blank>
   Password: <leave blank>

   b) For **Cingular** users, enter the following:

   APN: wap.cingular
   Username: WAP@CINGULARGPRS.COM
   Password: CINGULAR1

   Note: All of the above values are case sensitive.
   ---

3 Return to the main screen and select **Options**.

4 Next, select **Security Options**, then **Firewall**.

5 Click the thumbwheel and select **Reset Settings**.

6 Return to the main screen

Configuring for Other Carriers

To configure if your carrier is NOT T-Mobile or Cingular:

1   From the BlackBerry's main screen, select **Options** (i.e. click on the key icon).

2   Select **Security Options**, then **Firewall**.

3   Click the thumbwheel and select **Reset Settings**.

4   Return to the main screen

For Customers using a BES

For customers using devices deployed from a **BES** (BlackBerry Enterprise Server), please ensure that the BES policy associated with the device is configured to:

1   Allow third party applications to be installed on the device

2   Allow external connections to be made from the device

Checklist for Getting Started

To set up Top Producer for BlackBerry, ensure the following:

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

Follow these steps to make sure that you have been assigned a Top Producer for BlackBerry 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 BlackBerry**.

    The displayed agent now has a Top Producer for BlackBerry 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 BlackBerry** from the drop-down list and click **OK**.

The displayed assistant now has a Top Producer for BlackBerry 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 BlackBerry:

1 Use the USB slot to connect your device to the computer.

2 From the **Setup** menu in Top Producer 7i, under **Applications setup**, click **TOP PRODUCER 7i for handhelds**.

3 From the *Handheld manager*, click the **Download Client Software** action item.

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

4 Select the **BlackBerry Handheld** radio button and then click **OK**.

5 From the *Handheld manager*, select the link to download the BlackBerry handheld client software.

The **Subscriber Agreement** screen appears.

6 Read and accept the agreement, then click **Next**.

The **Connected** screen will appear.

7 Click on the **Load** link.

The BlackBerry software will now be downloaded, a progress bar will appear showing the installation's progress. When the installation is complete, the **Handheld manager** will reappear.

Note: Windows users might get a security message asking whether they'd like to run the file or save it to the desktop. If this is the case, click **Run** to proceed with the installation.

Step 4 - Download Data onto your Handheld

There are two methods for downloading your Top Producer 7i data onto your handheld:

- **Download from your computer:** When you select this option, you'll receive an email confirming that your data is ready for download. Once downloaded, you can restore this file using the **BlackBerry Desktop Manager**.

- **Download over-the-air:** This method does not require that you be near your computer. However, it can take a long time, depending on the size of your database and the wireless signal's strength. We recommend large or unlimited data plans when choosing this option. If you have any questions about your data plan, please contact your wireless provider.

> **Note:** Top Producer strongly recommends the **Download from your computer** option. For users with larger databases (i.e. 500+ contacts), this is the fastest and most reliable option for restoring data onto your device.

Downloading from your Computer

To download your data using the "Full Data Recovery via Email" method:

1 Make sure that you have connected your handheld to your computer through the USB port.

2 Open Top Producer for BlackBerry.

> **Important:** A Full Data Recovery (FDR) replaces all the data on your handheld. Before doing an FDR, make sure that any changes that you've made to the data on the handheld have been synchronized with Top Producer 7i.

A dialog box appears prompting you to download your data.

3   Select **No**, then from the main menu, select **Full Data Recovery Via Email**.

The **Login** screen appears.

4   Enter your Top Producer 7i username and password.

Warning: After performing an FDR via Email, it is very important not to use or synchronize your Top Producer for BlackBerry application until you have successfully restored the database file (i.e. the IPD file). Otherwise, any data entered on the device will be lost.

5   Once completed, you will receive an email message indicating that your Top producer data is ready for download.

6   Start up your Internet Browser on your PC and sign onto your Top Producer account.

7   From the setup menu, select **Application Setup**, then **Top Producer 7i for Handhelds**.

     The *Handheld Manager* Screen appears.

8   From the **Action** menu, select **Download Email FDR results**.

     The *FDR Database download* page appears.

9   Go to your computer's desktop and create a folder called **FDR_download**. Then, return to the Top Producer *FDR download* page and click on the download link.

     The *Download* screen will appear.

10   Name the file **TPBB.ipd**, then save it to the **FDR_download** folder.

     The download will proceed. When finished, click **OK**. Your TP database has now been downloaded to your folder.

11   If Top Producer is running on your BlackBerry, shut it down by choosing **Shutdown** from the main menu. Then make sure that your BlackBerry is connected to your computer's USB port.

12   From your desktop, select **Start** > **Programs** > **BlackBerry** > **Desktop Manager**.

     This launches the **BlackBerry Desktop Manager** on your computer.

13   Double click on the BlackBerry manager's **Backup and Restore** icon. When that screen opens, click **Restore**.

14   A screen will appear asking you to locate the file containing the restore information. Navigate to the folder **FDR_download**, select **TPBB.ipd**, then click **Open**. An information message will appear. Click **OK**.

     The data-loading screen appears and displays the progress of the database loading.

     Note: Please make sure that your BlackBerry is connected to your computer throughout this

process. Depending on the size of your data, it may take from several minutes to over an hour.

15 When the restore is complete, the **Backup and Restore** screen will re-appear on your computer. Click **Close** to exit.

16 Launch the Top Producer application on your BlackBerry.

The handheld will now organize the downloaded data. This can also take from several minutes to over an hour.

17 When completed, the Top Producer application opens and your newly-installed data appears.

> **Note:** If Top Producer opens with no data, select **Shutdown** from the main menu and restart the Top Producer application. If you still have problems, please contact Top Producer Technical Support.

Receiving Data Over-the-air

To receive your data over-the-air:

> **Note:** Make sure you have a good wireless signal and an appropriate data plan package before proceeding. Depending on the size of your database, this process could take 30 minutes to a few hours.

1 Open Top Producer for BlackBerry.

A dialog box appears prompting you to download your data.

2 Select **Yes**.

The **Login** screen appears.

3 Enter your Top Producer 7i username and password.

4 From the menu, select **Login**.

Your data will begin downloading onto your handheld.

5 Once you see the message **Process completed** on the handheld, select **Close** from the menu. You should now be able to access your data from Top Producer for BlackBerry.

Step 5 - Start up Top Producer for BlackBerry

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

Logging on

To log onto Top Producer for BlackBerry:

1 From the handheld's main screen, select the **Top Producer** application.

Important: If you have BlackBerry Device Software version 4.6 or later installed, Top Producer for BlackBerry will be located in the *Downloads* folder.

You can move Top Producer for BlackBerry to the *Home* or *Applications* folder by selecting the Top Producer for BlackBerry icon, clicking the ▦ key, and then selecting **Move To Folder**.

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2 If it is the first time you have opened the application, you will be asked for login information and then a dialogue box will appear prompting you to download your Top Producer 7i data.

3 The home screen appears, displaying tabs for each feature.

Installing from Top Producer 8i

Step 1 - Assign a License

Follow these steps to make sure that you have been assigned a Top Producer for BlackBerry 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 BlackBerry** 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 BlackBerry** 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 BlackBerry:

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 **BlackBerry** radio button and click the **Next** button.

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 of the 8i online help system.

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 **BlackBerry Client Software** link.

    The Subscriber Agreement appears.

9   If you accept the terms, select the **I have read and accept the terms of this agreement** radio button and click the **Next** button.

10 Scroll to the bottom of the BlackBerry Application Installation window and click the **Load** button.

    The application is loaded onto your BlackBerry.

Step 3 - Download Data onto your Handheld

There are two methods for downloading your Top Producer 8i data onto your handheld:

- **Download from your computer:** When you select this option, you'll receive an email confirming that your data is ready for download. Once downloaded, you can restore this file using the **BlackBerry Desktop Manager**.

- **Download over-the-air:** This method does not require that you be near your computer. However, it can take a long time, depending on the size of your database and the wireless signal's strength. We recommend large or unlimited data plans when choosing this option. If you have any questions about your data plan, please contact your wireless provider.

> **Note:** Top Producer strongly recommends the **Download from your computer** option. For users with larger databases (i.e. 500+ contacts), this is the fastest and most reliable option for restoring data onto your device.

Downloading from your Computer

To download your data using the "Full Data Recovery via Email" method:

1 Make sure that you have connected your handheld to your computer through the USB port.

2 Open Top Producer for BlackBerry.

3 A dialog box appears prompting you to download your data.

You have no local data. Do you wish to log into the platform and do a full data recovery to retrieve the latest data from the server?

Yes

No

4   Select **No**, then from the main menu, select **Full Data Recovery Via Email**.

    The **Login** screen appears.

Login

Username: username
Password: ******

5   Enter your Top Producer 7i username and password.

_____

Warning: After performing an FDR via Email, it is very important not to use or synchronize your Top Producer for BlackBerry application until you have successfully restored the database file (i.e. the IPD file). Otherwise, any data entered on the device will be lost.

_____

6   Once completed, you will receive an email message indicating that your Top producer data is ready for download.

7   From Main Menu of Top Producer 8i, select the Mobility icon.

The *Mobility* Screen appears.

8   Click the **Email FDR Dataset** link.

The *FDR Database download* page appears.

9   Carefully follow the instructions on the download page for downloading the dataset to your computer and restoring it to your device. When the process is completed, your device is ready to use.

Receiving Data Over-the-air

To receive your data over-the-air:

Note: Make sure you have a good wireless signal and an appropriate data plan package before proceeding. Depending on the size of your database, this process could take 30 minutes to a few hours.

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1   Open Top Producer for BlackBerry.

A dialog box appears prompting you to download your data.

2   Select **Yes**.

The **Login** screen appears.

3   Enter your Top Producer 8i username and password.

4   From the menu, select **Login**.

Your data will begin downloading onto your handheld.

5   Once you see the message **Process completed** on the handheld, select **Close** from the menu.

You should now be able to access your data from Top Producer for BlackBerry.

Step 4 - Start up Top Producer for BlackBerry

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

Logging on

To log onto Top Producer for BlackBerry:

1   From the handheld's main screen, select the **Top Producer** application.

Important: If you have BlackBerry Device Software version 4.6 or later installed, Top Producer for BlackBerry will be located in the *Downloads* folder.

You can move Top Producer for BlackBerry to the *Home* or *Applications* folder by selecting the Top Producer for BlackBerry icon, clicking the ▦ key, and then selecting **Move To Folder**.

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2   If it is the first time you have opened the application, you will be asked for login information and then a dialogue box will appear prompting you to download your Top Producer 7i data.

3   The home screen appears, displaying tabs for each feature.

Contacts

In this chapter:

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.

You can send email and make or receive calls directly from the contact record. For more information, see *"Sending Email and Placing and Receiving Calls" on page 41*.

Finding and Displaying Contacts

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)

Summary of Contacts Screen Menu Commands

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.

Table 1: Contacts Tab Menu Commands

Command	Description
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.*

Table 1: Contacts Tab Menu Commands

Command	Description
Search	Search for Contacts.
Add to Favorites	Adds the contact to the Favorites Tab.
Filter By All	Displays all contacts and leads.
Filter By 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.
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.
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.
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.
Shutdown	Shuts down the Top Producer application on the device.

Table 1: Contacts Tab Menu Commands

Command	Description
Close	Closes the Top Producer application on the device, but keeps it running in memory, so that it can be opened quickly.

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

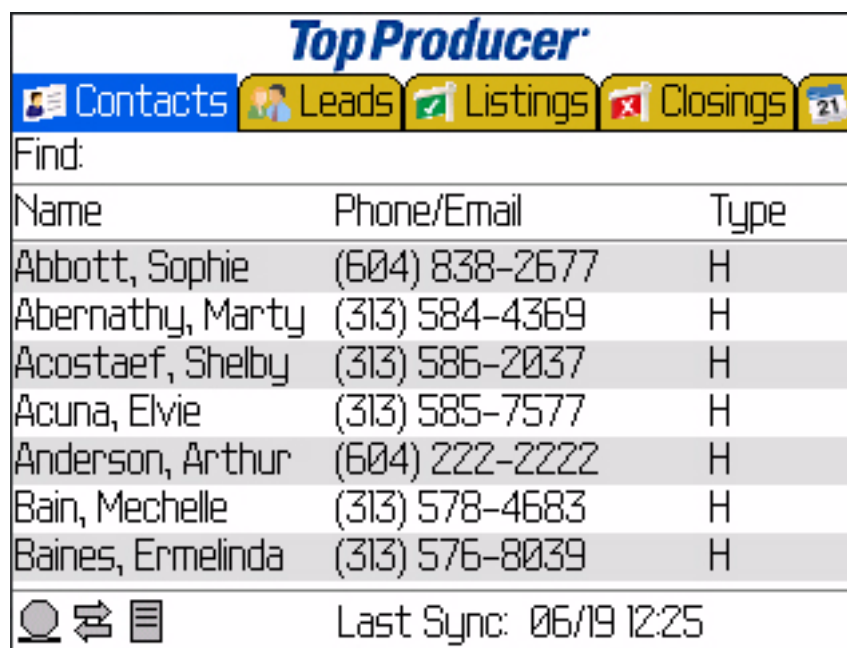For further information, please visit **www.TopProducer.com** or contact our sales department at 1-800-241-5309

Accessing the Contacts Screen

To display all contacts:

1 Select the **Contacts** tab.

The *Contacts* screen appears.

2 To view or edit a contact's details, select the contact and then select **Edit** from the menu. For more information, see *"Editing a Contact Entry" on page 49*.

> **Tip:** To find a contact, move to the **Find** field just below the tabs and start keying in the letters of the contact's last name. The list of contacts will shrink to display just those starting with those letters. When you see the one you want, use the trackball to move to its row and then click on it to display the record.
>
> Also, note that you can use **[Alt] Q** to go to the top of the list and **[Alt] A** to go to the bottom.

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   From the *Contacts* screen, scroll until the first contact is selected.

2   From the main menu, select **Filter By Contact Type**.

The list of available contact types appears.

3   Select the contact type.

The list displays only contacts of that type.

> **Note:** To return to the full contact list, select **Filter By All** from the main menu.

Using the *Find* field

For a quick searches, use the **Find** field.

To search for a contact using the *Find* field:

1   From the *Contacts* screen, move to the **Find** field just below the tabs.
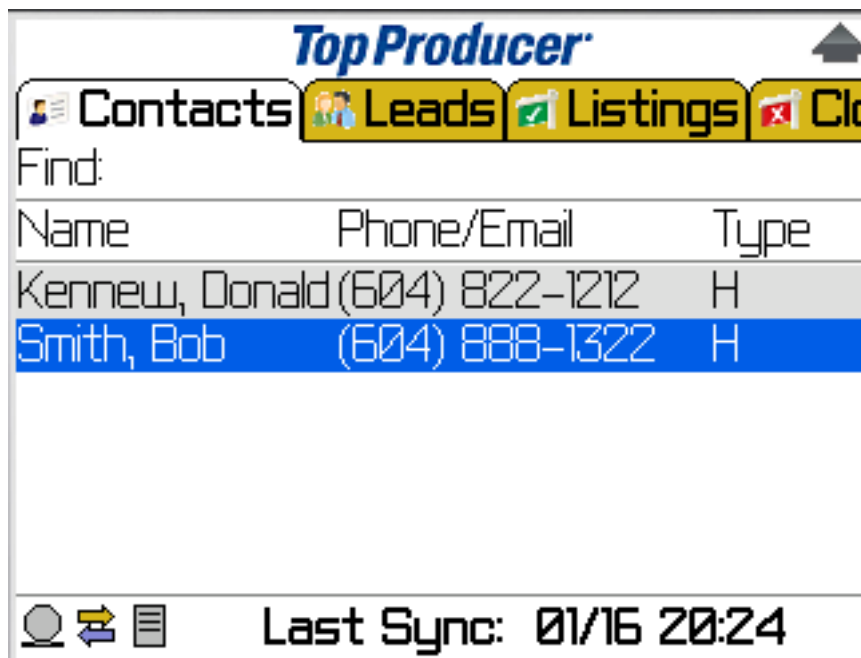
2   Start keying in the letters of the contact's last name.

The list of contacts will shrink to display just the records that start with those letters.

3   When you see the desired contact, use the trackball to move to its row, then click on it.

The contact's record is displayed.

4   When you're finished, you can re-display the complete list of contacts by moving back to the **Find** field and deleting the letters you typed in.

Tip: To quickly navigate from the tabs to the *Find* field, press **[Alt]** and scroll down on the thumbwheel.

For devices without a trackball navigation system (e.g. the 7130 and the 8700 Series), you can quickly navigate from a tab to the

corresponding Find field or record list by pressing **[Alt]** while scrolling down on the thumbwheel.

Using the Search Screen

For more precise searches, use the *Search* screen. Using this, you can search for contacts using multiple search criteria at the same time.

To perform a search using the *Search* screen:

1   From the *Contacts* screen, select **Search** from the menu.

The *Search* screen appears.

2   Select the word **Contact** on the first line and then click the thumbwheel.

The available search criteria (**Contact**, **Address**, **Phone/Email**, and **All**) are displayed.

3   Select the desired criteria, then from the menu select **Run Search**.

A list of matching contacts is displayed.

4   Select the desired contact and then click on it to view the record.

Note: You can perform similar searches from the *Leads*, *Listings*, and *Closings* screens.

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 Select the **Contacts** tab.

2 From the main menu, select **Add**.

The *New Contact* screen appears.

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

4 To input a special character, select **Show Symbols** from the menu. The *Symbols* screen will appear. To insert, click on the desired character.
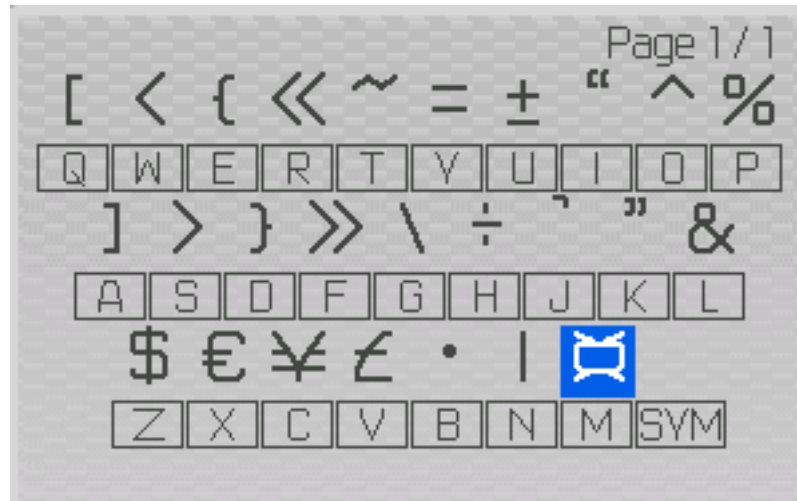
5 On the **General** tab, enter the contact information.

- **ShowInList**: Select the primary information to display when viewed in a list of contacts.
- **Type**: Select one or more contact types. Changing what contact types are available must be done from Top Producer 7i/8i.

Note: 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.

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6 On the **Address** tab, enter the contact's address details.

7 On the **Present** and **Future** tabs, enter the contact's current property details and their ideal future-home details.

Note: This information can later be used to search for matching buyers and sellers. Any information you enter in the **Present** tab will also appear in the **Statistics** tab on the *Property Details* screen.

---

8 Select **Save** from the menu.

Sending Email and Placing and Receiving Calls

Receiving Calls

If you are using Top Producer for BlackBerry 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.
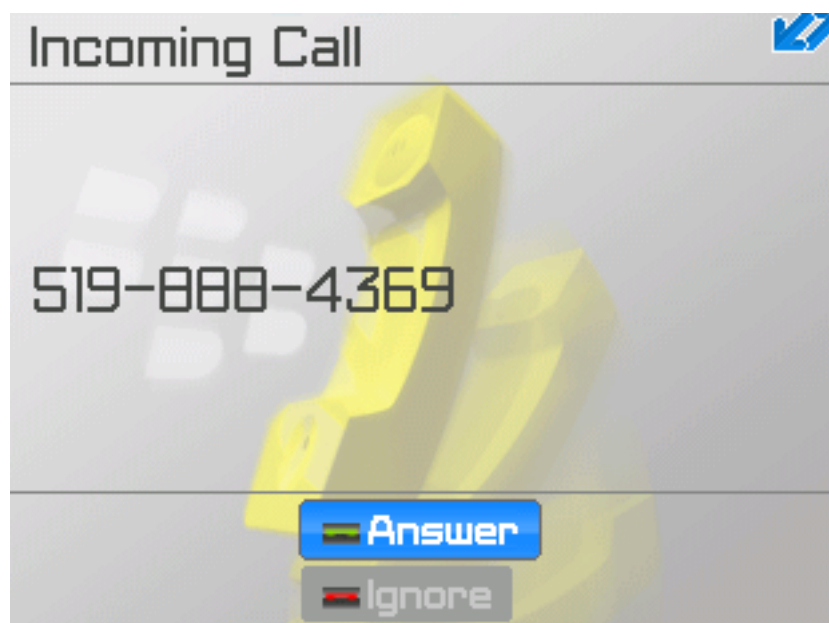
2   To answer the call, select **Answer**.

Your call will be connected.

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.

> **Note:** The number that appears in this list is the one that will be called. This is determined by the number you have selected in the **ShowInList** field in the contact record. For more information, see *"Creating a New Contact Entry" on page 39*.

3   Select **Call [number]** from the menu. If you are asked to confirm the call, select **Yes**.
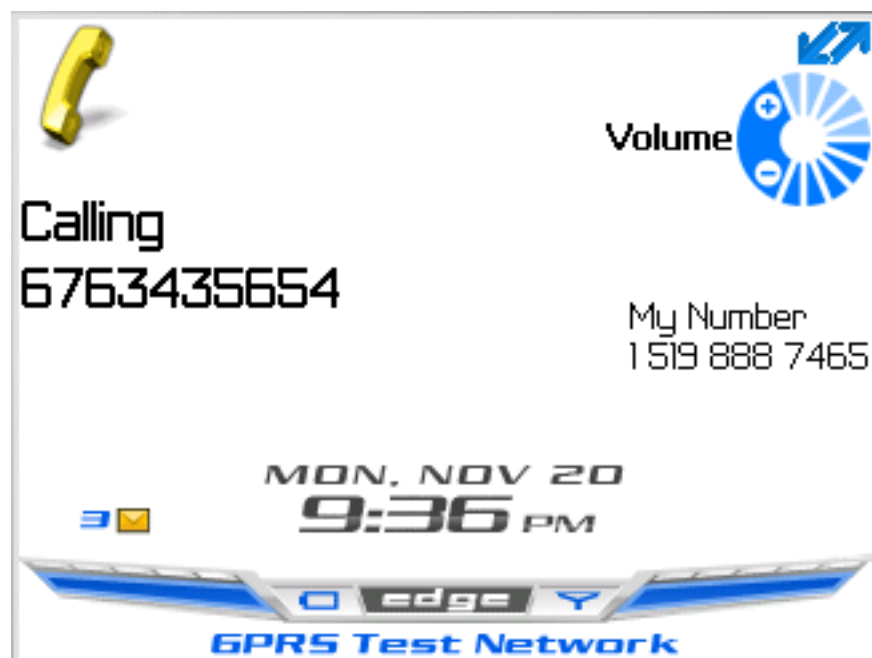
Your call will be connected.

> **Tip:**   To view all of the contact's phone numbers, select **All Phone/Email** from the menu.

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.

4   Enter the email's subject.

5   Enter the message body in the area below.

```
To: Art Candler                            ▲
To: Candler, Art
To: Candler, Art
Subject: Are we still on for Friday?
─────────────────────────────────────────
Hi Art:

  Are we still going to get together for lunch
Friday?

Cheers

Dave▌
```

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 Select 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   Select **Add** from the menu.

The *Property Add* screen will appear.

Property Add

| Address | Statistics | Dimensions |

PropertyType: ▼   Investment
MailToAddress: ▢
HouseNumber:
DirectionPrefix: ▼
StreetName:
StreetDesignator: ▼
DirectionSuffix: ▼
SuiteNumber:
POBox:
Building/Floor:
City: ▼   ▼

5   On the **Address** tab, enter the property's address
    information.

   a) Select the **PropertyType** you are adding (e.g.
      Primary, **Investment** or **Other**).

   b) Select **MailToAddress** and then click on it to
      place a check mark in it if you want to include
      this address for any future mailings associated
      with the contact.

   > **Note:** You can also change this by selecting the
   > field and then selecting **Change Option**
   > from the menu.

6   On the **Statistics** tab, enter the property details.

Table 2: Property Statistics

Field Name	Description
TaxAssessment	Enter the total value of the land assessment and building improvements. This value is determined by the tax assessment department.
LandAssessment	Enter the dollar amount of the land. This value is used to determine the total tax assessment.
BuildingImprov	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, select **Save**.

Adding Property Notes

To add comments about a property:

1 Select the **Contacts** tab.

2 Select the contact whose properties you want to view.

3 Select **Properties** from the menu.

   The *Associated Properties* screen opens.

4 Next, select **Notes** from the menu.

   The *Associated Notes* screen opens.

5 Select **Add** from the menu.

   The *Property Note Add* screen opens.

6   Enter your note and then select **Save** from the menu to save it. For more information about adding, deleting and modifying notes, see *"Managing Notes" on page 48*.

7   When you're done, select **Close** from the menu.

The *Associated Properties* screen reopens. To go back to the contacts screen, again select **Close** from the menu.

Editing a Property

To modify a property's information:

1   Select 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 44*.

6   When you're done, select **Save**.

Sorting Properties

To sort property information:

1   Select the **Contacts** tab.

2   Select the contact whose properties you want to sort.

3   Select **Properties** from the menu.

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

The properties will re-appear sorted by the criteria you've chosen.

5   To exit **Sort**, select **Close** from the menu.

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. Select the **Contacts** tab, then select the contact whose notes you want to modify.

2. Select **Notes** from the menu.

3. To add a note:

   a) Select **Add** from the menu.

   The *Contact Note Add* screen appears.

   ```
   Contact Note Add
   Notes: 11/21/2006 8:46 PM by fn ln – ▌
   ```
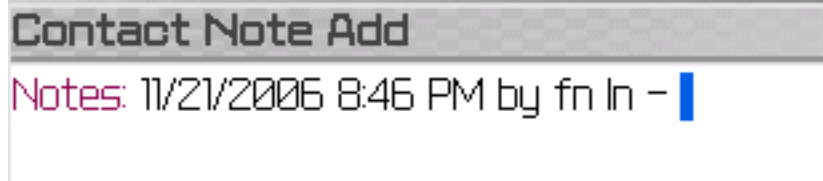
   b) Enter your note, and then select **Save** from the menu.

4. To edit a note:

   a) Select the note.

   b) Select **Edit** from the menu.

   c) Modify the note, and then select **Save** from the menu.

5. To delete a note:

   a) Select the note you want to delete.

   b) Select **Delete** from the menu.

   c) When prompted to confirm, select **Yes**.

Editing a Contact Entry

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

To edit a contact:

1 Select the **Contacts** tab.

2 Select the contact you want to modify.

3 Select **Edit** from the menu.

The *Contact Edit* screen opens.

4 Modify the contact's information.

5 When you're done, select **Save** from the menu.

Adding a Contact to your Favorites List

You can keep a list of the contact records you deal with the most by adding the record to the Favorites list. These records can then be easily accessed from the **Favorites** tab.

Note: You must synchronize any newly added contacts with Top Producer 7i/8i before you can add the contact to your Favorites list on your handheld.

Adding a Contact to Favorites

To add a contact to the Favorites list:

1   Select the **Contacts** tab.

2   Select the contact you want to add to your favorites list.

3   Select **Add to Favorites** from the menu.

The selected contact is added to the **Favorites** tab.

Leads

In this chapter:

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 102*.

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.

Table 4: Leads Tab Menu Commands

Command	Description
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.
Add to Favorites	Adds the lead to the Favorites Tab.
Filter By All	Displays all leads.
Filter By Status	Displays leads with a specific status (**New**, **Followed Up**, etc).

Table 4: Leads Tab Menu Commands

Command	Description
Sort By	Sort leads by name 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 how the tabs are displayed. It also allows you to hide the Top Producer logo.
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.
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.
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.

*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 Select the **Leads** tab. The *Leads* screen appears
   and displays a list or your leads.

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

   The *Lead Edit* screen appears.

3 Make the desired changes and then select **Save**
   from the menu.

Tip: Key in the first letter of the lead's last name
to jump to that part of the list.

Note that if you are using a handheld with
just one letter per keyboard key, you can
use **[Alt] T** to go to the top of the list and
[Alt] B to go to the bottom.

However, if your device has two letters per
key, use **[Alt] Q** to go to the top of the list
and **[Alt] A** to go to the bottom.

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 Select the **Leads** tab.

2 Select a lead from the list below.

3 Select **Filter By Status** from the menu.

The list of available statuses appears.
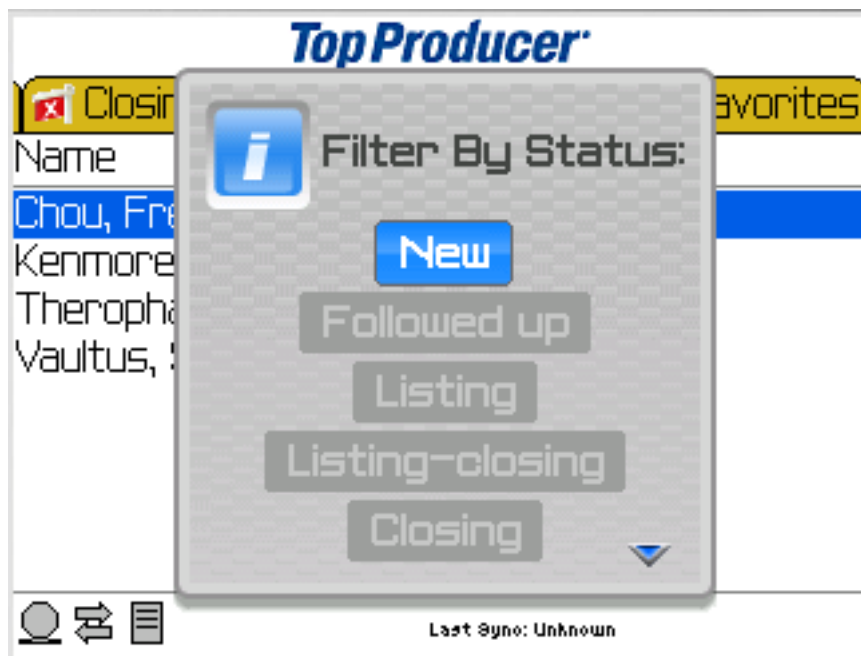
4 Select the status you want to view (e.g. select **New** to view all your new leads).

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   Select the **Leads** tab.

2   Select a lead from the list.

3   From the main menu, select **Add**.

4   In the **Source** field, enter the lead's source by selecting an item from the pick list. Note that **Source** is a required field.

Tip: Adding the lead's source will help you determine which lead-generating methods are bringing in the most leads.
Also note that referrals can't be created on the handheld. Please synchronize the device and then use Top Producer 7i to create referrals.

---

5   Enter the lead's information. For more information, see *"Creating a New Contact Entry" on page 39*.

6   When you are 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 BlackBerry only after synchronization.

Following-up on a Lead

To follow-up on a lead:

1   Select the **Leads** tab.

2   Then select the lead you want to follow-up on.

3   Select **Activities** from the menu.

    The *Associated Activities* screen opens.
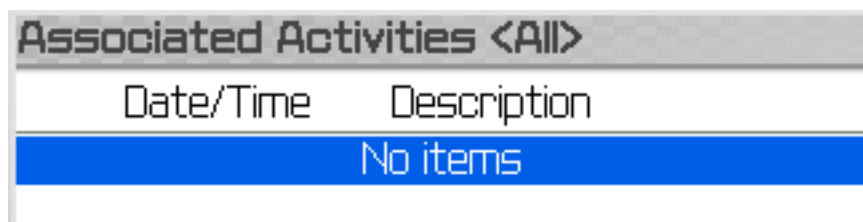
4   From the menu, select **Add**, then select one of the follow-up activity types (i.e. **Appointment**, **Call** or **To-do**).

5   Enter the activity's details.

6   When you're finished, select **Save**, then select **Close**.

    The follow-up activity is now assigned to that lead.

> **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   Select the **Leads** tab.

2   Select the lead you want to modify.

3   Select **Edit** from the menu.

4   Modify the lead's information. For more information, see *"Creating a New Contact Entry" on page 39*.

5   When you're done, select **Save** from the menu.

Adding a Lead to Your Favorites List

You can keep a list of the leads you deal with the most by adding their records to the favorites list. These records can then be easily accessed from the *Favorites* tab.

Note: Newly added leads must be synchronized with Top Producer 7i/8i before you can add the lead to the Favorites list on your handheld.

Adding a Lead to Favorites

To add a lead to the Favorites list:

1   Select the **Leads** tab.

2   Select the lead and then select **Add to Favorites** from the menu.

The selected contact is added to the **Favorites** tab.

Time Management

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 Activites** 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.

Table 5: Today's Activities Tab Menu Commands

Command	Description
Add	Adds a new activity.
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.

Table 5: Today's Activities Tab Menu Commands

Command	Description
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.

Viewing a List of all Activities

You can quickly display a list of all your activities.

To view an activity list:

1 Select the **Today's Activities** tab.

   All appointments, calls and to-do activities appear. Note that timed calls appear in the Appointments list.

TopProducer

ngs 🗓 **Today's Activities** ⭐ **Favorites**

Date/Time   Description

🕐 2/13 4:00p   Pick up sign at 328

⬤ ⇄ ▤   Last Sync: 01/16 20:24

Calendar View

By selecting the **Calendar** menu item from **Today's Activities**, you can display your activities as they would appear in a daybook planner. This is called the *Calendar View*. In this view, you can display your schedule in four different ways:

- **Day view:** This view provides a convenient overview of your agenda for the selected day.

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

- **Month view:** This view looks much like a calendar, with the current day displayed in bold. Note that the activity details are not displayed in this view. To see them, use the trackball to highlight the desired day, then click on it and select **View Day**.

- **All view**: This displays the calendar's list view, which shows all scheduled events as a chronological list.

> **Note:** The 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 Select the **Today's Activities** tab

2 Select **Calendar** from the menu.

The calendar's *Day* view appears.
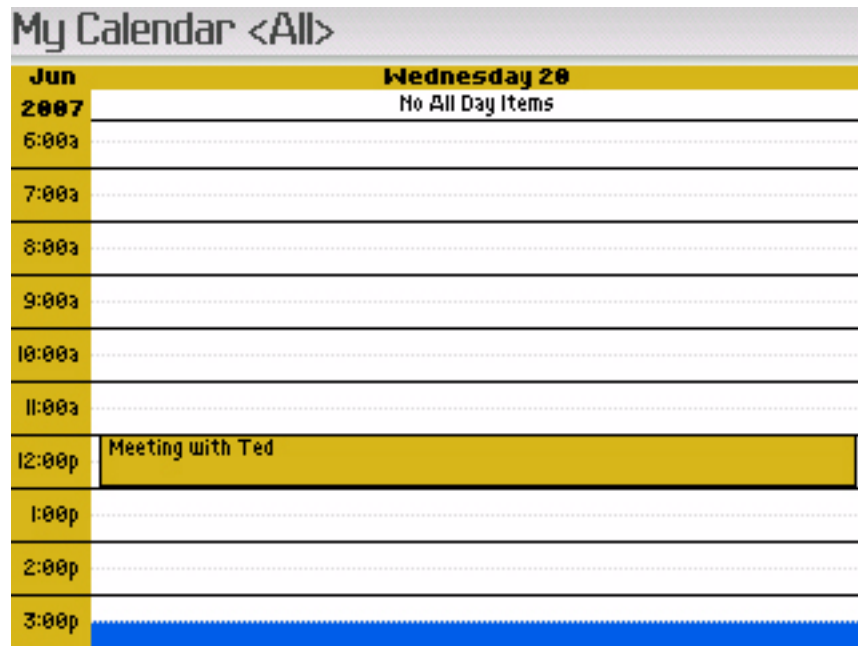
3 To see the *Week* or *Month* view, select one of the
   View Week or **View Month** menu items. For a
   chronological list of all activities, select **View All**.

Note: If you are using either the 7130 or 8700
series devices, by holding down the **[Alt]**
key, you can use the trackball to horizontally
scroll through the Calendar's Month view.

Below is an example of the Month view. The moon icons stand for **PM** (the sun is shown when it is **AM**).

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   Select the **Today's Activities** tab.

2   Select an activity from the displayed list.

3   From the main menu, select **Filter By Assigned To**.

4   Select the assignee whose activities you want to see. The assignee's activities will appear.

Scheduling Activities

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

All activities—regardless of whether you specified a start and end time—will appear in **Today's Activities** (see *"Viewing a List of all Activities" on page 65)*.

Note: Repeating activities must be scheduled in Top Producer 7i/8i.

Scheduling an Activity

To schedule an activity:

1   Select the **Today's Activities** tab.

2   From the main menu, select **Add**.

3   Select the activity type that you want to add (e.g. an appointment).

The appropriate screen appears.

4   Enter the activity details—the following table describes some key activity-details fields.

Table 6: Activity Details

Field Name	Description
Date	Enter the activity date.
Start and **End**	Enter the activity's start and end time by selecting **Change Option** from the menu and then selecting the time. This option is available for calls and appointments only. Note that if you set a time for a call, it will appear in both the **calendar** and in **Today's business** as an appointment.
Description	Enter a description of the activity.
Priority	Type a priority level for the activity. This option is available for **to-do** activities only.

Table 6: Activity Details

Field Name	Description
Remind	Enter the number of days you want the activity reminder to appear in **My Today's Business**. This option is available for **to-do** activities only.
AssignedTo	Enter who will be performing the activity by selecting the **Change Option** menu item and then selecting the contact.

5   To set an alarm for either a call or an appointment:

a) Put a check mark in the **Alarm** check box.

b) In the **Min.Before** field, use the pick list to select the number of minutes in advance you want the alarm to remind you of the activity. The default is 15 minutes; the maximum is 180 minutes. 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 selected the **Shutdown** menu item). However, alarms will appear if the application is still running in the background (i.e. you selected the **Close** menu item or pressed **escape**.)

---

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

a) In the **LinkTo** field, select either **Listing** or **Closing** from the pick list.

b) Then from either the **Listing** or the **Closing** field, select **Change Value** from the menu.

c) Next, select the listing or closing you want to link this activity to.

d) Finally, select **Accept Choice** from the menu.

7   Select the **Contacts/Leads** tab to associate this activity with a contact.

   a) Select **Add Contact/Lead** from the menu.

   b) Search for the contact you are creating the activity for.

   c) When you have found the contact, select it from the list, then select **Accept Choice** from the menu.

   d) Select **Save** from the menu. The selected lead will now appear on the **Contacts/Leads** tab.

Changing an Activity's Details

Editing an Appointment's Details

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

To modify an appointment:

1 Select 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.

4 You can now make the desired edits. When you're finished, select **Save** from the menu.

Editing an Activity

To modify activity details:

1   Select 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   Select the **Today's Activities** tab.

2   Select the activity you want to reassign.

3   Select **Edit** from the menu.

4   Select **AssignedTo** and then select **Change Option** from the menu.

5   Select the team member you want from the **AssignedTo** pick list.

6   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   Select the **Today's Activities** tab.

2   Select the activity you want to mark **done**.

3   Select **Mark Done** from the menu.

   If the activity is linked to a listing or a closing, a dialog box will open and ask if you'd like to add the activity to the service report.

4   Select **Yes** if would like to add it.

5   On the *Service Report Activity Add* screen, enter the details.

6   When you're finished, select **Save**.

   The details that you entered will appear in the service report.

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 77*.

Deleting an Activity

To delete an activity:

1 Select 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 the activity.

Searching for an Activity

To search for an activity:

1 Select the **Today's Activities** tab.

2 Select **Search** from the menu.

   The *Find Today's Activities* screen appears.

3 Select who the activities are assigned to.

4 Select **Run Search** from the menu.

   The *Search Results* screen will be displayed.

Listings

In this chapter:

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 **My Today's business**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.

Table 7: Listings Tab Menu Commands

Command	Description
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.
Add to Favorites	Adds the listing to the Favorites Tab.
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.
Login	If your current status is Off-line, this allows you to login to Top Producer prior to synchronizing changes.

Table 7: Listings Tab Menu Commands

Command	Description
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.
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.
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.
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.

Accessing the Listings Screen

1 To display all listings:

1 Select the **Listings** tab.

The *Listings* screen appears.

2 To view or edit a listing's details, select the listing and then select **Edit** from the menu. For more information, see *"Editing a Listing" on page 85*.

> **Tip:** Key in the first letter of the seller's last name to jump to that part of the list.
>
> Note that you can use **[Alt] Q** to go to the top of the list and **[Alt] A** to go to the bottom.

Viewing Listings by Status

To view listings by status:

1   Select the **Listings** tab, then select a listing.

2   Select **Filter By Listing Status** from the menu.

The list of available statuses appears.

3 Select the status you want (e.g. to only see active listings, select **Active**).

The list displays only listings with the desired status.

4 To go back to the complete set of listings, select **Filter By All** from the menu.

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 *Listing Edit* 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 90*.

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 102*.

Editing an existing listing

To edit an existing listing:

1   Select the **Listings** tab.

2   To modify listing notes or activities, select the listing you want to view.

   a) To work with activities, select **Activities** from the menu. For more information, see *"Time Management" on page 62*.

   b) To work with notes, select **Notes** from the menu. For more information, see *"Managing Notes" on page 48*.

3   When you're finished, select **Close** to return to the *Listings* screen.

4   To modify other listing information: select a listing, then select **Edit** from the menu.

The *Listing Edit* screen opens.

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

Table 8: Listing Edit Fields

Field Name	Description
LockBox	If a lock box has been installed on the property, select the **LockBox** field, and then select **Change Option** from the menu.
Seller	Displays the name of the primary seller. To view a list of all sellers, see *"Viewing Listing Sellers" on page 88*.
MLSno	Enter the listing's Multiple Listing Service (MLS) number. If you do not use an MLS board, leave this field blank.
ListingStatus	Enter the listing's status. Note that if the listing is linked to a closing, you can't modify the listing's status.
ListingDate	Enter the listing date.

Table 8: Listing Edit Fields

Field Name	Description
ExpiryDate	Enter the listing's expiry date.
ReminderDate	Enter an expiry reminder date to remind you that the listing is about to expire.

6   Select the **Statistics** tab to enter the listing's statistics.

7   Select 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**.

8   Select the **Seller Parties** tab to view all associated sellers.

    All associated sellers appear. The primary seller is marked **Primary**.

9   When you're finished, select **Close** from the menu.

> **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   Select the **Listings** tab.

2   Select the listing from the list, then select **Seller Parties** from the menu.

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

Adding a Listing to your Favorites List

You can keep a list of all of the listing records that you deal with the most by adding the record to the favorites list. These records can then be easily accessed from the *Favorites* tab.

Adding a Listing to Favorites

To add a listing to the Favorites tab:

1   Select the **Listings** tab.

2   Select the desired listing.

3   Select **Add to Favorites** from the menu.

The selected listing is added to the **Favorites** tab.

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

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.

Table 9: Closings Tab Menu Commands

Command	Description
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.
Add to Favorites	Adds the closing to the **Favorites** Tab.
Filter By All	Displays all closings.
Filter By Closing Status	Displays closings that match a certain type (e.g. **Pending (showing)**).

Table 9: Closings Tab Menu Commands

Command	Description
Sort By	Sort closings by Full name, First Name or Last Name.
Login	If your current status is Off-line, this allows you to login to Top Producer prior to synchronizing changes.
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.
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.
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.
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.

Accessing the Closings screen

To access the *Closings* screen:

1   Select the **Closings** tab.

The *Closings* screen appears.

2   To view a closing's details, select the closing and then select **Details** from the menu.
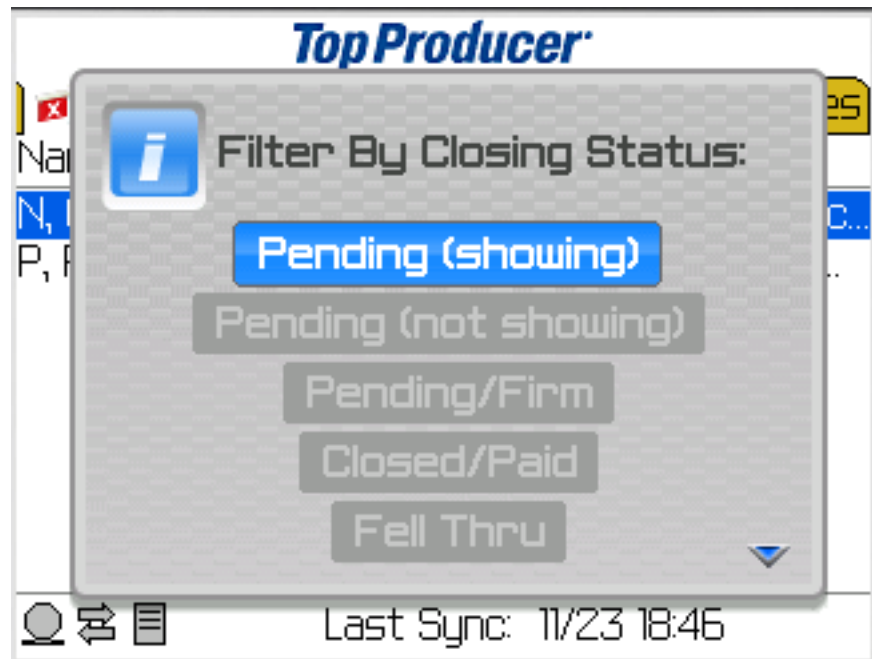
The *Closing Details* screen appears.

Viewing Closings by Status

To view closings by status:

1   From the **Closings** tab, scroll until the first closing is selected.

2   Select **Filter By Closing Status** from the menu.

The list of available statuses appears.

3   Select the status you want to see.

4   Closings with the desired status are displayed.

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.
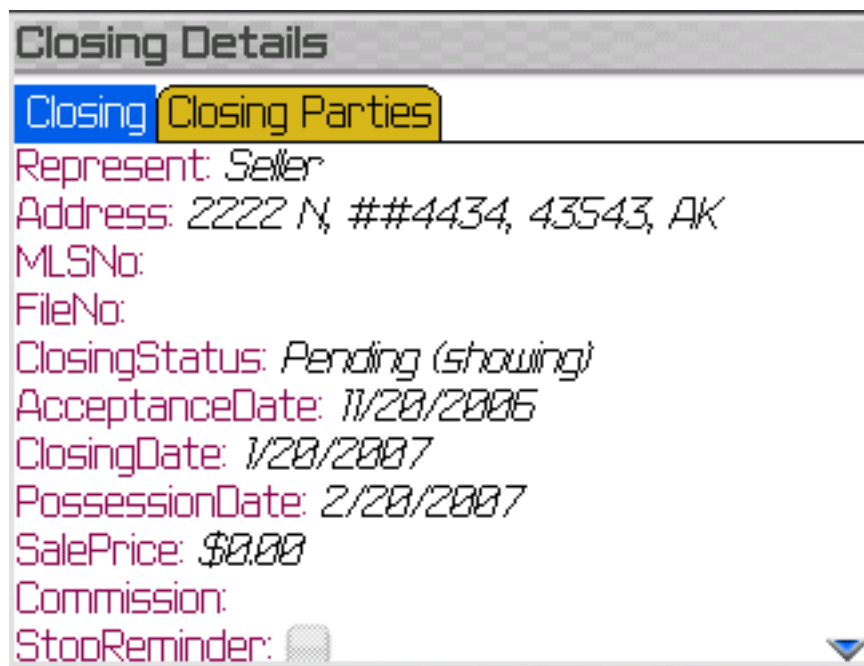

Note: Archived activities cannot be edited.

Viewing Closing Details

To view a closing's details:

1   Select the **Closings** tab.

2   Select a closing record and then select **Details** from the menu.

The *Closing Details* screen appears.

Some of the fields displayed on this screen are:

Table 10: Closing Details Fields

Field name	Description
MLSno	Displays the property's MLS number (assigned when the listing was originally posted on an MLS board). If the property was never listed on an MLS board, this field will be blank.
FileNo	Displays the closing's file number. This is for your reference only.
StopReminder	If this check box is selected, activity reminders will only appear in the activity list for this closing—not in **My Today's Business**. Activities created in the calendar, the Contacts screen, or **My Today's Business** will not be affected by **StopReminder** being activated.
Represent	Displays whether you represent the seller the buyer, or both.

3   To view closing parties, select the **Closing Parties** tab.

4   From the main menu, select **Activities** to view, add or edit activities linked to the closing. For more information, see *"Time Management" on page 62*.

5   To manage closing notes, select **Notes** from the menu. For more information, see *"Managing Notes" on page 48*.

6   When you are finished, from the *Closing Details* screen, select **Close** from the menu.

You are returned to the *Closings* screen.

Adding Closings to your Favorites List

You can keep a list of the closing records you deal with the most by adding them to the favorites list. They can then be accessed easily from the *Favorites* tab.

Adding a Closing

To add a closing to the Favorites list:

1   Select the **Closings** tab.

2   Select the desired closing record and then select **Add to Favorites** from the menu.

   The selected closing is added to the **Favorites** tab and the screen re-displays your list of closings.

Synchronization

In this chapter:

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 102*.

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.

Synchronizing your Data

To synchronize your data:

1　Start up Top Producer for BlackBerry.

2　From the main 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 104* or *"Viewing Synchronization Results from Top Producer 8i" on page 104*.

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.

Background Synchronization

Synchronization status icons

The device-status icons tell you what the connectivity status of your device is (e.g. **working online** and **Connected to Top Producer**).

The complete set of status indicators and their possible states are describe in the following table.

Table 11: BlackBerry Status Indicators

Icon	Explanation
	(Yellow) Working online (Recommended)

Table 11: BlackBerry Status Indicators

Icon	Explanation
	(Grey) Working off-line (Not Recommended)
	(Green) Last sync operation was successful.
	(Red) Last sync operation was unsuccessful. From the menu, select Sync Status to view sync error. Contact Top Producer Technical Support if this continues.
	(Grey) Last sync operation currently unknown.
	(Blue) Connected to Top Producer. You can perform sync operations when connected.
	(Grey) Not connected to Top Producer. You cannot perform sync operations when disconnected.

Background synchronization notes

Top Producer for BlackBerry automatically performs fast sync operations in the background. This is triggered after a certain number of records —usually 10—have been added.

Note: No option exists to disable this feature.

Some key things to keep in mind about background synchronization are:

- Two arrows displayed at the top right of the screen are the only indication that a background sync is being performed.

Synchronization

- During background sync, the application can still be fully used.
- If the background sync has failed, the home-screen icon turns red

- If the background sync succeeds, the home-screen icon turns green and a timestamp is generated

Last Sync: 02/02 16:29

> **Note:** The logs in the 7i Handheld Manager also provide detailed information about each sync operation. You can access the *Sync status* menu from the Home screen's tabs.

Working off-line

Top Producer for BlackBerry provides you with the ability to work off-line. To do this:

1 From the *Contact's* tab, select **Work Off-line** from the menu.

The grey **not connected** and **working off-line** icons appear at the bottom to indicated that you are off-line.

2   Some key things to keep in mind when working offline are:

a) You can still use the application locally, but there is no network connectivity.

b) No background syncs can take place. This can lead to a large accumulation of changes on the device.

c) When you login to the application to restore network connectivity, it's possible that you might lose some of your data.

Important: We strongly recommend that you work online when using Top Producer. If you must work offline, you should do so for at most two days at a time. Avoid adding new records while working off-line.

Miscellaneous

In this chapter:

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.

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

Not all fields contain a pick list. If you are unable to enter text in a field and **Change Option** appears in the menu, this means that the field is a pick list.

To select item(s) from a pick list:

1 Select **Change Option** from the menu.

> **Note:** If a new screen appears after selecting **Change Option**, proceed to step 3.

2 Select an item from the available list.

The pick list closes and the selected item appears in the appropriate field. Do not complete the remaining steps.

3 Select the item you want to apply.

4 Select **Change Option** from the menu.

The item is selected.

5 To apply additional items, repeat steps 3 and 4.

6 When finished, select **Save** from the menu.

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 click on the up arrow increases the number; each click 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.

Additional Action Icon

A downward-pointing arrow displayed beside a field means that you must perform additional steps for that field. For example, in the screen shot below, the arrow beside **AssignedTo** means that you must select that field, click on it, then select **Change Option**, and then pick an item from the pick list.

Specifying Dates

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   The date is split into three fields: month, day and year. Select the one you want to modify.

2   Select **Change Option** from the menu.

3   Scroll up or down to select the desired item.

4   Repeat steps 1 - 3 for each portion you want to modify.

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 BlackBerry

To uninstall Top Producer for BlackBerry:

1   Perform a synchronization to make sure that everything is up-to-date.

2   On the BlackBerry device, go to **Options** -> **Advanced** -> **Applications**.

The **Applications** screen will appear.

3   Scroll to **TPBB**, then from the menu select **Delete**.

4   You will be prompted to confirm the deletion. Click the **Delete** button to confirm.

5   After Top Producer for BlackBerry has been deleted, you will be prompted to reset the device. Select **Yes**.

The Top Producer for BlackBerry application has now been deleted from the device.

> **Note:** To re-install Top Producer for BlackBerry, please follow the installation procedure outlined in "Installing from Top Producer 7i" on page 10.

Frequently Asked Questions

Why can't I connect to a location outside the firewall?

Problem: You've received the error message: "The application has attempted to open a connection to a location outside the firewall which is not allowed by your IT Policy."

Explanation: This is caused by an IT Policy setting on your BlackBerry Enterprise Server called **Allow Split Pipe Connections**. This IT Policy setting prevents applications from switching between TCP/IP and MDS connections.

Solution: Enable the **Allow Split Pipe Connections** setting on the IT Policy for all Mobile Desktop users. To do this:

1   Open the BlackBerry Manager.

2   On the Tree tab, right-click **BlackBerry Enterprise Server** and select **IT Policy**.

    The *IT Policy setting for BlackBerry Server* screen appears.

3   Click **Edit**.

    The *Edit IT Policy* screen appears.

4   Select the *Allow Split Pipe Connections* checkbox, then Click **OK**.

How do I fix incorrect dates and times?

Problem: The currently displayed date and/or time is incorrect.

Solution: Reset your device, by turning the handheld off and on.