Top Producer® SellPhone™

User Guide

Top Producer® SellPhone™User Guide

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Table Of Contents

Getting Started

In this chapter:

What is Top Producer SellPhone?

Welcome to Top Producer SellPhone. Top Producer SellPhone allows you to access your Top Producer 7i email, contacts, activities, listings, closings and leads from wherever wireless Internet service is available.

This section tells you:

About Wireless Internet Services

To start using Top Producer SellPhone:

- you will need an Internet-enabled mobile phone; or a BlackBerry® Handheld device.
- your cellular provider must support the wireless Internet.
- you may need to sign up for an Internet cellular account.

Your cellular provider may charge you whenever you are logged into the Internet with your phone's micro browser. After logging out of Top Producer SellPhone, make sure you also log out of the micro browser to avoid unnecessary cellular charges. Your cellular provider may also have specific charges for wireless Internet usage; please contact your provider's customer service for information on billing.

Setting Up Top Producer SellPhone

You do not have to install or set up anything to start using Top Producer SellPhone on your mobile phone. However, you may want to change some of the default application settings to customize Top Producer SellPhone to suit your working preferences.

Top Producer SellPhone can be set up:

- to display a specified screen whenever you log in
- to accept a specified login authentification rule of your choice
- to alert you when a lead is received (if your phone supports this function), etc.

These, and many other useful Top Producer SellPhone settings, are set up from the *SellPhone preferences* page in Top Producer 7i.

Changing SellPhone Default Settings in Top Producer 7i

If you choose to change the default settings for Top Producer SellPhone, you are required to log in to Top Producer 7i, point to **Setup**, **Applications setup**, and then click **Top Producer SellPhone**.

For more detailed information on using the *SellPhone preferences* page, please see *"Customizing Top Producer SellPhone Preferences" on page 95* in this User Guide.

Assigning A License To An Assistant

If you have an assistant, you can assign a Top Producer SellPhone license to them so that they can access your Top Producer 7i database using Top Producer SellPhone.

The instructions below assume you have already set up an assistant. If you have <u>NOT</u> and you would like more information, please see Top Producer 7i's online Help or User Guide.

To assign a Top Producer SellPhone license to an assistant:

1. Log on to Top Producer 7i.

2. Point to **Setup**, then click **Agent setup**.

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

4. Highlight an assistant and click **View or edit** from the action menu.

5. Select the **Give this assistant access to Top Producer SellPhone** check box.

   ☑ Give this assistant access to TOP PRODUCER 7i SellPhone

   Note: The assistant will require a Top Producer Sell-Phone license. To remove the license from the assistant, clear the check box.

6. Click **OK**.

How To Use This Guide

Main menu
Quick search
Search results
Selct contact
Selct Details
Contact record

```
1 Dial John Smith
2 Email John Smith
3▶Details
4 Delete
5 Menu

Selct            Back
```
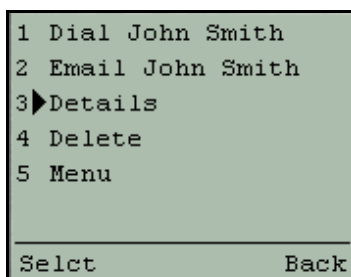
Each chapter describing Top Producer SellPhone's features starts with the steps required to accomplish common functions. The remainder of each chapter discusses the various phone screens in more detail.

Adjacent to each example of a Top Producer SellPhone screen is a table showing how to access the screen. In the example to the left, to access the contact *Details* screen (where you can dial a contact), start from the *Main menu* and proceed through the *Quick search*, *Search results*, *Contact selection*, *Contact details* and *Contact record* screens.

About Portable Document Format

The Top Producer SellPhone User Guide is presented in Portable Document Format (PDF), 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**.)

The guide is best used online on your computer screen, but you can also print the guide.

Saving the User Guide

If you have not already done so, please save the guide 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.

You can access the User Guide any time from Top Producer 7i:

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

   The *Download User Guides* page opens.

2. Click the hyperlink corresponding to the User Guide you want to download.

   The selected User Guide opens in Adobe Acrobat.

3. To save a copy of the User Guide, click the **Save** (🖫) icon from the Adobe Acrobat toolbar.

The *Save a Copy...* pop-up window opens.

4. Click the **Save in** drop-down list and specify a location on your computer (usually the **Desktop** is the easiest location).

5. Click **Save**.

How to print the User Guide

To print the Top Producer SellPhone User Guide:

1. From the Adobe Acrobat menu, click **File**, then click **Print**; or click the **Print** (🖨) icon.

   The *Print* pop-up window opens.

2. Set your printer options, then click **OK**.

Navigating within the User Guide

If you are reading the Top Producer SellPhone User Guide online as a PDF file, click any text that appears in blue to jump directly to that section, (for example, click on [feature] on page [XX]" to jump directly to that section).

Searching the User Guide

You can search for and locate specific information in this guide by looking for key words, such as "technical support", "email", or "listings".

To search the User Guide for specific text:

1. From the Adobe Acrobat toolbar, click the **Find** (🔍) icon; or from the main menu click **Edit**, then **Find**.

   The *Find* pop-up window opens.

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

3. Depending on your search preferences, select one or all of the **Match Whole Word Only**, **Match Case**, and **Find Backwards** check box(es).

4. Click **Find**.

Contacting Technical Support

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

- **Email:** support@topproducer.com.
- **Fax:** 604.270.6365.
- **Telephone:** 1.800.830.8300.

For support information and FAQs, go to www.topproducer.com.

How To Use An Internet-Enabled Mobile Phone

There are many different Internet-enabled phone models available. Top Producer SellPhone runs on your phone's **micro browser**, a phone function that allows you to access the Internet. Please see your phone's user guide for information on the micro browser and your specific phone's features.

The **Soft keys** are two buttons on the phone that are used to select the corresponding options listed at the bottom of the screen. They are called Soft keys because their function depends on the corresponding command at the bottom of the screen.

Use the **right Soft key** to select the right menu choice; in the example shown, this key would move **Back** a screen. In this example of a mobile phone, the Soft key is labeled HOME; in other phones it may not be labeled at all.

Use the **left Soft key** to select the left menu choice; in the example shown, this key would **Select** the highlighted option (**Go to today**).

Use the alphanumeric keys to make numerical selections and to enter text.

When Top Producer SellPhone requires text input, repeatedly pressing one of these keys will generate the corresponding letter. For example, press the **5** key once to enter **j**, twice for **k** and three times for **l**.
See *"How to enter text" on page 20* for more information.

Use the **CLR** button to delete characters. Some phones may not have a **CLR** button; refer to your phone guide for more information.

Use the **scroll keys** to navigate the screens. Some phones have 4 scroll keys, some have only 2. In Top Producer SellPhone, you only use the **Up** and **Down** scroll keys to navigate the screens.

Most phones have a hard **Back** key, which may be labelled **BACK**, **END**, or something else depending on the particular model of phone (refer to your phone manual). You can use this key to move to previous screens. *See "Back", on page 20.*

Press and hold the hard **Back** key to end the micro browser session at any time.

How To Use A BlackBerry Handheld Device

Top Producer SellPhone is designed to run on the BlackBerry® Handheld device. For information about the micro-browser, please see the product's user guide for information or talk to your service provider.

Note: The functions outlined below may vary slightly from device to device. The descriptions herein are simply suggested as a general guideline.

Use the **Trackwheel** to scroll through menus and click on functions. Roll the wheel up/down to scroll; press it to select (much like the mouse on your computer).

Wait for your wireless network to connect, (i.e. GSM or GPRS) and check the coverage strength indicator icon before selecting the browser icon.

Use the **Escape** key to return to a previous screen, or to hide and close a menu. Pressing it repeatedly will return you to the Home screen.

Press the **Enter** key to initiate an action (i.e. after entering your username and password, press **Enter**).

The **Power** key is the device's on/off switch. When turning the device on/off, hold the key down.

The **Alt** key lets you access the numbers and symbols printed above the letters on the keyboard, (i.e. [Alt + W] = 1).

Logging On And Off Top Producer SellPhone

Please contact your cellular provider for assistance with the following information required to log on to Top Producer SellPhone:

- how to start your phone's micro browser and enter the Top Producer SellPhone URL (tpsellphone.com).
- how to bookmark the Top Producer SellPhone URL.
- how to access the Top Producer SellPhone bookmark.

While you are talking with your cellular provider, you may also want to ask for assistance with setting up short message service (SMS) on your phone. For more information, see *"Enabling Lead Alerts" on page 98*.

Logging on

To log on to Top Producer SellPhone for the first time:

1. Connect to the wireless Internet using your phone's micro browser.

2. Go to **tpsellphone.com** using your phone's micro browser (or go to the Top Producer SellPhone bookmark if you have already set this up).

   The *Enter username* screen appears.

   Note: An "http://" prefix may be automatically added to the tpsellphone.com address. This means that the address in your phone's microbrowser may appear like this: http://tpsellphone.com. This is Top Producer SellPhone's way of directing you to a secure site, if necessary. You do NOT have to modify the address.

   ---

3. If you have not already done so, bookmark the *Enter username* screen so you do not have to enter the Top Producer SellPhone web address every time you

log on. The next time you want to log on, go directly to the Top Producer SellPhone bookmark.

4. Enter your Top Producer username and select **Next**.

5. Enter your password and select **Log on**.

   The main menu appears. For more information, see *"The Main Menu Options" on page 24*.

Note: When you log on to Top Producer SellPhone for the first time, you must enter both your username and password. On subsequent log-ons, depending on your cellular provider, you may only need to enter your password.

You can also set up Top Producer SellPhone so that when you log in you must enter both your username and password, just your password or just your PIN code. You can also set up Top Producer SellPhone so that you can log in without having to enter a username, password or PIN code. For more information, see *"Authentication rule" on page 97*.

Logging off

If you want another agent or assistant to use your phone to log onto Top Producer SellPhone, make sure the **Authentication rule** drop-down list is set to **Require username and password**, then log off. (You can set the **Authentication rule** drop-down list in Top Producer 7i.)

For more information, see *"Authentication rule" on page 97*. When another agent or assistant logs in, the *Enter username* screen appears, letting the agent or assistant specify their own username, then their password, to access Top Producer SellPhone.

To log off Top Producer SellPhone or change users:

1. From the main menu, select **Log off**. For more information, see *"The Main Menu Options" on page 24*.

   The *Thank you for using Top Producer SellPhone* screen opens.

2. To let another user log on, click **Logon**.

The *Enter username* screen opens.

3. From here, the user should specify their username and select **Next**.

4. The user should specify their password, and then click **Logon**.

5. To return to the phone's default browser screen, select **Home**.

The Basics

In this chapter:

Top Producer SellPhone Basics

This section explains the basics of using Top Producer SellPhone, including:

- scrolling around the screen.
- selecting options.
- navigating lists.
- entering text and dates.
- dialing a contact from a Top Producer SellPhone screen.

Screen size
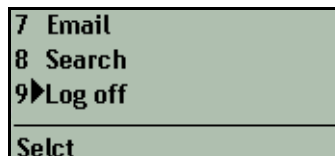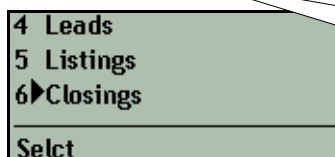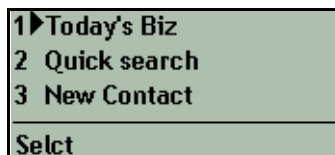
In this user guide, for clarity all screen options are displayed at once. However, most wireless Internet phones can only display a few lines of text at a time. Use the **Up** and **Down scroll keys** to access options that are hidden by the edges of the screen.

```
1▶Today's Biz
2 Quick search
3 New Contact
─────────────
Selct
```

```
4 Leads
5 Listings
6▶Closings
─────────────
Selct
```

Use the **Down scroll key** to scroll down the menu to display the remaining options.

TIP! If you don't see an option that you need, remember to scroll down the list to see if it is hidden at the bottom of the screen.

```
7 Email
8 Search
9▶Log off
─────────────
Selct
```

How to select options

A typical Top Producer SellPhone screen will have a number of options, with a menu bar at the bottom.

You can select an option in two ways:

- Press the corresponding number on the keypad, (for example, press **4** for **Go to today** in this example). Some menu options (for example those above **9**) may not have a quick-access key.

```
1 New activity
2 Change day
3 Week view
4▶Go to today
5 Menu



Selct          Back
```
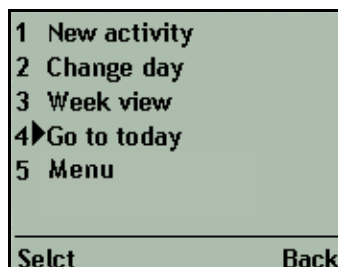
- Use the **scroll keys** to move the cursor to the appropriate selection, then press the **left Soft key** (**Selct**) to select it.

> **Note:** When using Top Producer SellPhone on a BlackBerry handheld device, there may be only one Soft key available in many instances. You can select an option by using the **Trackwheel** and the pop-up menu. For more information, see *"How To Use A BlackBerry Handheld Device" on page 14*.

How to navigate screens and lists

Navigation through the screens and lists in Top Producer SellPhone is accomplished by using Soft keys and menu items, as well as the phone's own keys such as **CLR**.

Back
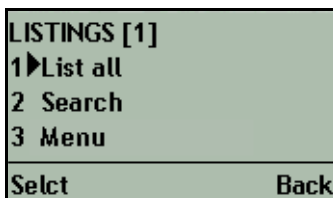
```
LISTINGS [1]
1▶List all
2 Search
3 Menu
Selct          Back
```

Use the **Back** Soft key or menu item, when available, to go to a previous screen. Most phones also have a key which can be used to go back to previous screens. This key may be labelled something like "**BACK**", "**END**", or "**CLR**". Press this phone key repeatedly to go back to previously viewed screens. If you are having difficulty leaving a feature or option, try selecting **Back** or pressing this phone key until you have the option of selecting **Menu** to return to the main menu. Please refer to your phone's User Guide for more information on which key to use.

```
LISTINGS [1]
◉ List all
○ Search
○ Menu
Back
```
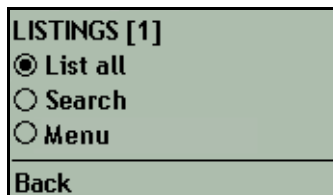
> **Note:** When using Top Producer SellPhone on the BlackBerry handheld device, as seen in the screen to the left, there is only <u>one Soft key</u> available. To select an item from the list, press the **Trackwheel** and use the pop-up menu.

-Next- and -Previous-

```
6 Cabotaje, Faustino
7 Cabral, Betsy
8 -Previous-
9▶-Next-
Enter note:
Call Tony tomorr |




Save          alpha
```

If a list (for example the results of a search) contains more than one page, use the **-Previous-** and **-Next-** options to navigate through the list.
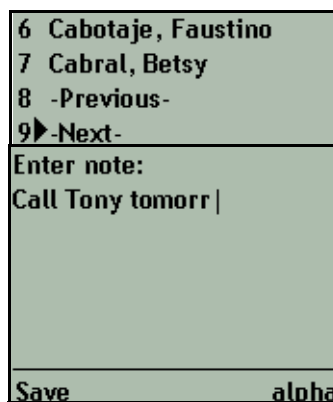
> **Note:** Pressing **Back** will not move back in the <u>list</u>, but will return you to the previous <u>screen</u>.

How to enter text

Your micro browser supports a number of different text-entry modes. How you select these modes depends on the model of

phone you have. Please refer to your phone's user guide for more information.

- **ALPHA** or **ABC —** Text entry mode.
- **NUM —** Only numbers will be entered.

When in **ALPHA** (**ABC**) mode, pressing one of the alphanumeric keys will enter the first of its corresponding letters. Quickly press the key repeatedly to select the other corresponding letters.

For example, press the **2abc** key once for **a**, twice for **b**, and three times for **c**.

To enter special symbols, keep pressing the *, **O** or **1** key until the symbol you need appears (see your phone guide for more information).

How to enter dates and times

All dates are entered in the **mm/dd/yy** format. All times are entered in the **hh:mm AM/PM** format. You do not have to enter the slashes (**/**); Top Producer SellPhone will automatically enter them for you.

If you enter an invalid date or time, you will see the *Invalid date/ Invalid time* screen. Select **Back** and re-enter the date or time.

```
Invalid date:
05/35/00

Back
```

Dialing contacts

In a number of screens, (for example, *"Contact operations" on page 34*), you can select **Dial** to call the contact immediately. Your cell phone will call the contact's default phone number, and when you end the call you will be returned to the same Top Producer SellPhone screen you were in before the call, without having to log back into Top Producer SellPhone.

```
1▶Dial John Smith
2 Details
3 Delete
4 Menu



Selct            Back
```

When a contact is called in this way, the default phone number is dialed according to the settings in Top Producer SellPhone preferences. For more information see *"Phone type priority for auto-dialing" on page 97* and *"Phone numbers" on page 99*.

Whenever you call a contact this way, after the call is completed you will be asked whether you want to create a marked done call activity for the contact. Select **Yes** to create a marked done call activity, **No** to cancel. For more information on activities, see *"Marking activities "done"" on page 45*.

About sessions

```
Your session has expired.

Logon
```

Whenever you log on to Top Producer SellPhone, a new session is created. As you use Top Producer SellPhone it will remember where you are and what you are doing. If you need to make or receive a phone call you can disconnect from your micro browser,

or if you are inactive for a period of time you may be automatically disconnected. When you reconnect to Top Producer SellPhone you will be returned to the same screen where you disconnected from.

If you are inactive for a long period of time, your session will be deleted and the next time you reconnect to the Internet you will see the *Expired session* screen. Select **Logon** to start afresh in Top Producer SellPhone.

Working With The Main Menu

In this chapter:

- *"The Main Menu Options" on page 24*

The Main Menu Options

```
SellPhone
1  Today's Biz
2  Quick search
3  New Contact
4  Leads
5  Listings
6  Closings
7  Email
8  Search
9  Log off

Selct
```

The main menu is the default start-up screen after logging on to Top Producer SellPhone. You can set up Top Producer SellPhone so that Quick search, Contact search, Today's business, Email, Closings summary, Listings summary or Leads summary are the first screens displayed. For more information, see *"Startup screen" on page 96*.

The main menu allows quick access to the following nine options. Select **Menu** to return to the main menu from other areas of Top Producer SellPhone.

- **Today's Biz (Today's Business)** — Display your activities for today, or schedule an activity. For more information, see *"Today's Business" on page 41*.

> **Note:** If your phone cannot display 18 or more characters per line, **Today's business** will be referred to as **Today's Biz** throughout Top Producer SellPhone.

- **Quick search** — Quickly look up a contact by name. For more information, see *"To search for and call/email a contact using Quick search:" on page 27*.
- **New Contact** — Add a new contact. For more information, see *"New Contact" on page 32*.
- **Leads** — Search for, view or call your leads. For more information, see *"Leads" on page 55*.
- **Listings** — Search for and view your listings and property information. For more information, see *"Listings" on page 62*.
- **Closings** — Search for and view your closings and property information. For more information, see *"Closings" on page 68*.
- **Email** — Send and receive email. For more information, see *"Email" on page 74*.

> **Note:** If you have not set up your email preferences in Top Producer 7i, you will not be able to send or receive email. Log into Top Producer 7i and click **My Email** to set up email. For more information about setting up email, see the online Help. You can also download the user guide from the online Help for more detailed information.

- **Search** — Search for contacts using a number of criteria or list all your contacts. For more information, see *"To search for a contact using Contact search:" on page 28*.

- **Log off** — Log out of Top Producer SellPhone. Remember to quit your micro browser to avoid unnecessary cellular service charges. For more information, see *"To log off Top Producer SellPhone or change users:" on page 16*.

Contact Management

In this chapter:

Finding And Adding Contact Information

Top Producer SellPhone provides a complete range of contact management features. You can:

- search for a contact by name, phone number, price range or contact type.
- call or email a contact.
- view or modify contact information.
- add, edit or delete contacts.
- link activities to the contact or view linked activities.

Using Quick search

The Quick search feature allows you to quickly find a contact by searching for their first or last name, or company name. Enter the full name or enter partial text.

```
1  Today's Biz
2▶Quick search
Selct
```

```
Type part of Name:
Jo|
Find              alpha
```

To search for and call/email a contact using Quick search:

1. Select **Quick search** from the main menu.

2. Enter a contact name, part of a contact name or a company name in the *Contact name* screen, then select **Find**.

   > **Note:** You can search by first name, last name, or both. Use a search format of **first name[space]last name**, or **last name[comma]first name**. You can search on name fragments (i.e. you can search for "Smith" using "Smi" or "Sm" or "ith").

```
1▶Dial John Smith
2  Email John Smith
3  Details
4  Delete
5  Menu


Selct            Back
```

3. Select a contact from the list that appears.

4. You can **Dial** or **Email** the contact, select **Details** to view the contact's information, **Delete** the contact or return to the **Menu**.

```
John Smith
555-555-4444 b
Email:
jsmith@hotmail.com
Contact type: Buyer
Note: 08/19/2003 -
───────────────────
More            Back
```

The *Contact details* screen displays the contact's information.

5. Select **More** for more options.

```
1▶Call John Smith
2  Phones: 1
3  Email address: 2
4  Notes: 1
5  Activities: 3
6  Contact types: 1
───────────────────
Selct           Back
```

6. You can **call** the contact's default number. To call the contact using one of their other numbers, select **phones**. Select the relevant option to view or edit the contact's associated **email address**, **notes**, **activities** associated with the contact, **contact types**, primary and secondary **names**, **address** or **company** name, or **delete** the contact.

Using Contact search

The Search feature lets you search for more criteria than the Quick search feature. Use the Search feature to find a contact by entering their name, phone number, present home minimum or maximum price, future home minimum or maximum price, and contact type.

To search for a contact using Contact search:

```
7  Email
8▶Search
9  Log off
───────────────────
Selct
```

1. Select **Search** from the main menu.

```
CONTACTS
1▶Search
2  List all
───────────────────
Selct
```

2. Select **Search** from the *Contacts* screen.

```
CONTACT SEARCH:
1  Name:
2  Phone:
3  Pres Home Min:
4  Pres Home Max:
5  Fut Home Min:
6  Fut Home Max:
7  Cont. type:
8▶Clear search
9  Menu
───────────────────
Selct           Find
```

3. You can search by contact **Name**, **Phone** number, price range of present and future home, **Contact Type**, or a combination of all of these. Select a search term to enter your search under the specified category. Select **Clear search** to clear your search and start again.

   If you are performing a search based on a **Min/Max** value range, the results will include any contacts within the specified price range. For example, for a **Pres Home Min** value of $120,000 and a **Pres Home Max** value of

$130,000, the results will include all records that match $120,000 up to and including $130,000 inclusive.

Contact name:
John|

OK   alpha

4. Enter your search information, then select **OK** to return to the *Contact search* screen. Select additional search terms to search under more than one category.

CONTACT SEARCH:
1▶Name: John

Selct   Find

5. Once you have entered all your search terms, select the **Find** Soft key to start the search.

2 Anderson, John
3 Cabral, John
4 Smith, John

6. The results of your search are displayed. Select a contact from the list to view it.

1▶Dial John Smith
2 Email John Smith
3 Details
4 Delete
5 Menu

Selct   Back

7. You can **Dial** or **Email** the contact, select **Details** to view the contact's information, **Delete** the contact or return to the **Menu**.

John Smith
555-555-4444 b
Email:
jsmith@hotmail.com
Contact type: Buyer
Note: 08/19/2003 –

More   Back

8. The *Contact details* screen displays the contact information. Press the **More** Soft key to view or edit the contact's name, phone numbers, notes, contact types, secondary name, company name and associated activities.

Entering a new contact

You can use the New Contact feature to enter a new contact record.

To enter a new contact:

```
SellPhone
1  Today's Biz
2  Quick search
3▶New Contact

Selct
```

1. Select **New Contact** from the main menu.

```
Primary first name:
John|


Next              +ALPHA
```

2. Enter the contact's first name and select **Next**.

3. Enter the contact's last name and select **Next**.

```
Secondary first name:
|

Next              ALPHA
```

4. Optionally, enter a secondary first and last name (for example, the contact's spouse. You can enter nothing and select **Next** to leave the fields empty.

```
Home#:
5558770509|


Next
```

5. Enter the **home** phone number and select **Next**.

```
Business#:
|


Next
```

6. Enter the **business** number and select **Next**.

```
Mobile#:
|


Next
```

7. Enter the **mobile** number and select **Next**.

```
Email address:
jsmith@hotemail.com|


Next
```

8. Enter the **email address** and select **Next**.

```
Contact type:
Sel|

Save              alpha
```

9. Enter the first few letters of the contact type and select **Save**. If you do not want to enter a contact type, leave the field blank.

```
1▶Seller
2  Seller - currently listed

Selct
```

10. Select the contact type you want to use from the list of matching contact types. If no types match your entry, the entire list will be displayed.

```
1▶Call John Smith
2  Phones: 1
3  Email address: 2
4  Notes: 1
5  Activities: 3
6  Contact types: 1

Selct             Back
```

11. Enter more contact information by selecting **Phones**, **Notes**, **Address** or **Company**. You can link an activity to the contact by selecting **Activities**.

The Contact Management Screens

Quick search

```
Type part of Name:
|




Find              ALPHA
```

Use Quick search to quickly search for a contact. All contacts containing the search term in their first or last names, or in their company name will be displayed.

To perform a quick search:

1. Select **Quick search** from the main menu.

2. Enter a name, part of a name, or a company name. If you leave this empty, all your contacts will be displayed.

3. Select **Find**.

    A list of all contacts matching your search is displayed. For more information, see *"Contact list" on page 34*.

> **Note:** You can search by first name, last name, or both. Use a search format of **first name[space]last name**, or **last name[comma]first name**. You can search on name fragments (i.e. you can search for "Smith" using "Smi", "Sm" or "ith".)
>
> For example, to search for Michael Smith, you could enter "michael smith", "mic smi", "smith,michael", "sm,mic", or just "smi". Entering just "smi" would also display any contacts with first name Jasmine, last name Wordsmith, etc.

New Contact

```
SellPhone
1  Today's Biz
2  Quick search
3▶New Contact

Selct
```

Select **New Contact** from the *Main menu* to add a new contact. You will be prompted to enter the contact's primary and secondary (i.e. spouse) names, phone numbers, email address and contact type. For more information, see *"To enter a new contact:" on page 30*.

Contacts

```
CONTACTS
1▶Search
2 List all

Selct          Back
```

Select **Search** from the *Main menu* to display the *Contacts* screen. From here you can select:

- **Search:** search for a contact using a range of criteria. For more information, see *"Contact Search" on page 33*.
- **List all:** display a list of all your contacts. For more information, see *"Contact list" on page 34*.

Contact Search

```
CONTACT SEARCH:
1  Name:
2  Phone:
3  Pres Home Min:
4  Pres Home Max:
5  Fut Home Min:
6  Fut Home Max:
7  Cont. type:
8▶Clear search
9  Menu

Selct          Find
```
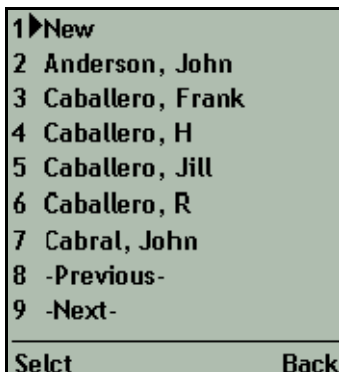
Use *Contact search* to search for contacts matching one of a number of search criteria.

1. Select one of the search criteria. You can fill out as many of the search criteria as you want. If you want to display all your contacts, do not enter any search criteria and skip to Step 2.

   - **Name:** enter a name, part of a name, or a company name.
   - **Phone:** enter a phone number or part of a phone number.
   - **Pres Home Min:** enter the lower amount of the contact's present home price.
   - **Pres Home Max:** enter the upper amount of the contact's present home price.
   - **Fut Home Min:** enter the lower amount of the contact's desired future home price.
   - **Fut Home Max:** enter the upper amount of the contact's desired future home price.
   - **Cont. type**: enter a contact type. You can use fragments of contact types; if you want to search on more than one contact type, separate them with a semi-colon.
     Example: enter **Buy;Sell** to locate all contacts with type Buyer, Buy Once, Seller, Sell Consortium, etc.
   - **Clear search:** clear all your search terms.
   - **Menu:** return to the main menu.

When entering minimum and maximum values for a search, Top Producer SellPhone searches for and returns all records containing the values within the specified range, including the minimum and maximum values.

2. When you are ready to perform the search, select **Find** to display a list of contacts matching your search criteria. For more information, see *"Contact list" on page 34*.

Contact list

```
1▶New
2  Anderson, John
3  Caballero, Frank
4  Caballero, H
5  Caballero, Jill
6  Caballero, R
7  Cabral, John
8  -Previous-
9  -Next-

Selct              Back
```

The *Contact list* screen displays the results of a contact search or your entire contact list if you selected **List all**.

- navigate through the contact list by selecting the **- Previous -** and **- Next -** options.
- to create a new contact, select **New** to display the *Primary first name* screen. For more information, see *"Enter contact name" on page 40*.

> **Note:** The **New** option is only available if you selected **List all** and NOT when you perform a search.

- to view, edit or delete a contact, select the contact to display the *Contact operations* screen.

Contact operations

```
1▶Dial Alice Berkley
2  Email Alice Berkley
3  Details
4  Delete
5  Menu


Selct              Back
```
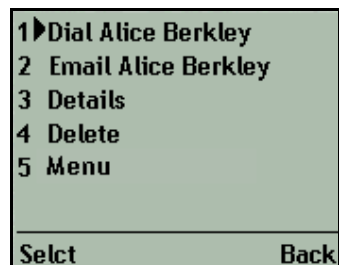
From the *Contact operations* screen you can do the following:

- **Dial:** dial the contact's default number. For more information, see *"Dialing contacts" on page 21*.
- **Email:** send an email to the contact. For more information, see *"Composing a message" on page 82*.

> **Note:** The Email option is only available if you have set up your email address on the *Agent setup* page of Top Producer 7i; AND if the selected contact has an email address specified.
>
> If the selected contact does NOT have an email address entered, use the *Add email* screen via the **Details** option to enter this information.

- If the contact has multiple email addresses, you will be able to select the address you want from the list.

> **Note:** If the contact has multiple email addresses and you have the *"Always use primary email address…"* setting selected, the primary email address will be used. For more information, see *page 105*.

- **Details:** view or edit the contact. For more information, see *"Contact details" on page 35*.

- **Delete:** delete the contact. You can set up Top Producer SellPhone so you do not have to confirm the deletion of contacts, notes, phone numbers, activities, leads, listings or closings. For more information, see *"Show 'Delete' confirmation" on page 98*.
- **Menu:** return to the main menu.

Contact details

Main menu
Quick search
Contact list
Contact operations
Contact details

```
Jane Smith
555-345-7869 h




More            Back
```

```
Jane Smith
555-345-7869 h
333 Maple, Portland,
Oregon
Email:
jsmith@domain.com
Contact type: Buyer
Note: 09/22/2003 -
Met her at Carlton
open house.
More            Back
```

The *Contact details* screen displays the following contact information:

- contact name and secondary name (if applicable)
- phone number
- address
- company name
- email address
- contact types
- present property price range
- future property price range
- most recently entered note

The two examples on the left show a contact with name and phone number only, and another contact with all the above fields present.

For more contact details, to edit the contact, or to link activities to the contact, select **More** to display the *Contact menu* screen. For more information, see *"Contact menu" on page 35*.

Contact menu

Main menu
Quick search
Contact list
Contact operations
Contact details
Contact menu

```
1 Call John Smith
2▶Phones: 1
3 Email address: 1
4 Notes: 0
5 Activities: 0
6 Contact types: 1
7 Names
8 Address
9 Company
  Delete

Selct           Back
```

Select **More** from the *Contact details* screen to display the *Contact menu* screen, where you can select the following:

- **Call:** call the contact (if a phone number is available). If your phone allows, you will be returned to the *Contact menu* screen once the call is completed.
- **Phones:** view, add or delete phone numbers. For more information, see *"Phone list" on page 36*.
- **Email address:** view a list of the contact's email addresses, add a new email address, or email the contact. For more information, see *"Email address list" on page 37*.
- **Notes:** view, edit or delete notes. For more information, see *"Notes" on page 38*.
- **Activities:** view all appointments, calls, to-dos and email associated with the contact, or link an activity. For more information, see *"The Activity list" on page 50*.

- **Contact types:** add or remove contact types associated with the contact. For more information, see *"Contact types" on page 39*.
- **Names:** change the contact's name or enter/change a secondary contact name. For more information, see *"Enter contact name" on page 40*.
- **Address:** View, enter or edit the contact's address information. For more information, see *"Address" on page 40*.
- **Company:** Enter or edit company information. Once you have entered the company information, select **OK** to save the company name and return to the *Contact menu* screen.
- **Delete:** Delete the contact.

Phone list

Main menu
Quick search
Contact list
Contact operations
Contact details
Contact menu
Phone list

```
John Smith
1▶555-877-0509 b
2  555-215-8604 h
3  555-566-7112 m
4  New
5  Back

Dial            Edit
```

The *Phone list* screen displays all phone numbers associated with the contact. Extensions are preceded by the **+** sign. The type of phone number is indicated after the number (the first letter of the phone type is displayed), for example:

h: Home number

b: Business number

f: Fax number

m: Mobile number

o: Other number

- Select **New** to enter a new phone number and display the *Add phone* screen. See *"Add phone"* below.
- Place the cursor next to a number and select **Edit** to change the number or type. For more information, see *"Edit a phone number" on page 37*.
- Place the cursor next to a phone number and select **Dial**, or press the corresponding numeric key to dial the number.

Add phone

Main menu
Quick search
Contact list
Contact operations
Contact details
Contact menu
Phone list
Add phone number

```
Add phone
Number:
5557178898|




Save
```

Enter a new phone number of the default type. For more information, see *"Phone type priority for auto-dialing" on page 97*. Enter numbers only when inputting phone numbers - do not enter spaces, brackets or dashes.

- Enter a phone number in the *Add phone* screen and select **Save** to display the *Phone menu* screen. For more information, see *"Edit a phone number" on page 37*.

Note: When entering area codes, be aware of your local phone company's rules for dialing local

area codes. For more information, see *"Phone numbers" on page 99*.

Edit a phone number

604-123-4567 (Business)
1▶Edit number
2 Edit extension
3 Dial
4 Change type
5 Delete

Selct   Back

Highlight a phone number from the *Phone list* screen and select **Edit** using the Soft keys to edit a phone number. You can:

- **Edit number:** change the phone number.
- **Edit extension:** enter or edit the phone extension.
- **Dial:** call the number.
- **Change type:** change the type of number. The phone types you can choose from depend on the types you have in Top Producer 7i.
- **Delete:** delete the number

Email address list

Alice Berkley
1▶alberkley@site.com
2 aberkley@hootmail.com
3 aberk@yooha.com
4 New
5 Back

Email   Edit

The *Email address list* screen lists all email addresses associated with a contact. The option to email a selected address is only available if you have set up an email address on the *Agent setup* page of Top Producer 7i.

- If the selected contact does NOT have an email address entered, the *Add email* screen is displayed so you can enter this information.
- Highlight an email address and press the **Email** Soft key to send an email to the address. For more information, see *"Composing a message" on page 82*.
- Highlight an email address and press the **Edit** Soft key to edit or delete the email address.
- **New:** add a new email address. Select **Save** when you have entered the new address.
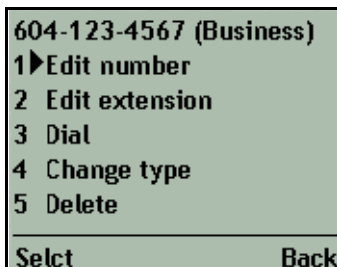
Edit email address

alberkley@site.com
1▶Email
2 Edit address
3 Delete

Selct   Back

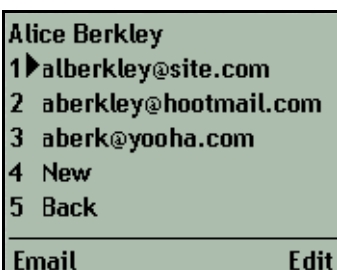From the *Edit Email address options* screen you can select:

- **Email:** send an email to the address. For more information, see *"Composing a message" on page 82*.
- **Edit address:** edit the address. Select **Save** when done.
- **Delete:** delete the address.

> **Note:** The Email menu item is only available if you have set up your email address on the *Agent information* page in Top Producer 7i.
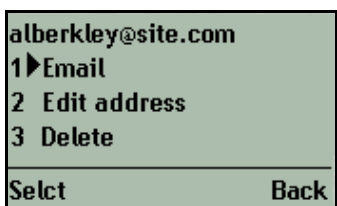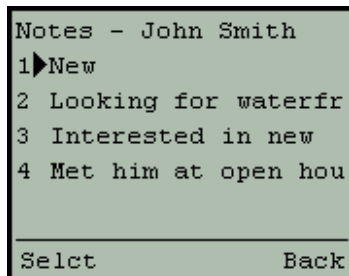
Notes

The *Notes* screen lists all notes associated with a contact. Notes are sorted by date of entry and displayed in descending order. If there are no notes associated with the contact, the *Enter note* screen will be displayed.

Main menu
Quick search
Contact list
Contact operations
Contact details
Contact menu
Notes

```
Notes - John Smith
1▶New
2 Looking for waterfr
3 Interested in new
4 Met him at open hou

Selct              Back
```
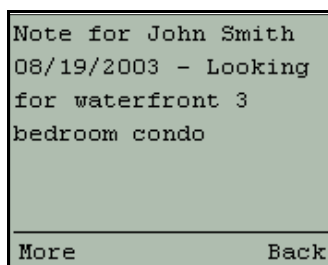
- **New** — enter a new note. For more information, see *"Enter note" on page 38*.
- To view, edit or delete a note, select it to display the *Note details* screen. For more information, see *"Note details" on page 38*.

Note details

The *Note details* screen displays the full text of the note.

Main menu
Quick search
Contact list
Contact operations
Contact details
Contact menu
Notes
Note details

```
Note for John Smith
08/19/2003 - Looking
for waterfront 3
bedroom condo

More               Back
```
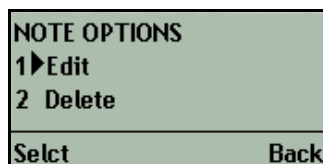
- **More** — edit the note. For more information, see *"Note options"* below.

Note options

From the *Note options* screen you can select:

```
NOTE OPTIONS
1▶Edit
2 Delete

Selct              Back
```

- **Edit** — edit or view the full text of the note. For more information, see *"Enter note"* below.
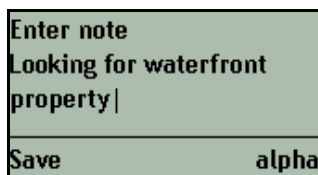
  > **Note:** If you enter a note that exceeds 256 characters, you will <u>NOT</u> be able to edit it in Top Producer SellPhone. Instead, you will see the "Unable to edit long value" message.

- **Delete** — delete the note.

Enter note

- **Save** — save the note and return to the *Notes* screen.

```
Enter note
Looking for waterfront
property|

Save              alpha
```

  > **Note:** If you want the date to be displayed automatically in notes, select the **Include date stamp in notes** check box in Top Producer 7i's *Preferences* window. Point to **Setup**, **Preferences**, and then **General**. The *Preferences* window opens. Select the **Include date, time, and created by stamp in notes** check box.

Contact types

```
Contact types for
John Smith
1▶Add
2  Buyer
3  Buyer - investor


Selct            Back
```
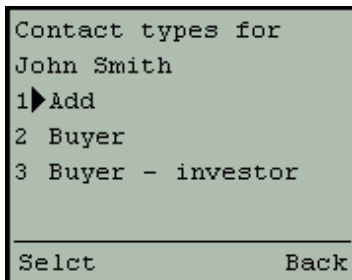
The *Contact types* screen displays a list of contact types associated with the contact, in alphabetical order.

- **Add:** associate a contact type with the contact. For more information, see *"Add contact type"* below.

> **Note:** You cannot create new contact types in Top Producer SellPhone. New contact types can only be created in Top Producer 7i. For more information about creating new contact types, please see Top Producer 7i's online Help or user guide.

- **Del:** remove a contact type. This Soft key option is only available when the cursor is next to a contact type.

Add contact type

```
ADD CONTACT TYPE
1▶Absentee owner
2  Active listing
3  Expired listing
4  Favorite
5  First time buyer(s)

Selct            Back
```

From the *Add contact type* screen you can do the following:
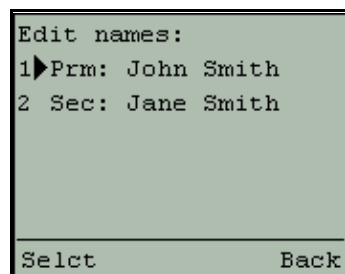
- Select a contact type to associate with the current contact.

> **Note:** A contact may have more than one contact type associated with it.

- Scroll down the list and select **Next** to see more contact types.
- **Back** — return to the *Contact types* screen without adding a contact type.

Edit names

```
Edit names:
1▶Prm: John Smith
2  Sec: Jane Smith




Selct            Back
```

Select **Names** from the *Contact menu* to edit or enter contact names*.*

From the *Edit names* screen you can change a contact (primary) name, or enter or change a secondary name.

- **Prm:** change a contact (primary) name. For more information, see *"Enter contact name" on page 40*.
- **Sec:** enter or change a secondary (spouse or partner) name. For more information, see *"Enter contact name" on page 40*.

Enter contact name

First name:

Next ALPHA

Last name:

Save ALPHA

In the *Enter contact name* screens you can enter a new contact's name, or edit a primary or secondary name.

- In the *First name* screen, enter the first name, then select **Next**.
- In the *Last name* screen, enter the last name, then select **Save**.

Address

John and Jane Smith
1▶Street address
2 City
3 Zip code
4 P.O. box
5 State

Selct Back

From the *Address* screen you can view, add or edit contact address information.

- **Street address** — view or edit the street address. See *"Street address"* below.
- **City** — view or edit the city. Select **Save** when done.
- **Zip code** — view or edit the Zip code. Select **Save** when done.
- **P.O. box** — view or edit the P.O. box. Select **Save** when done.
- **State** — view or edit the state. Select **Save** when done.
- **Country** — view or edit the country. Select **Save** when done.

Street address

Select **Street Address** from the *Address* screen to enter or edit a street address.

To enter or edit a street address:

House number:
123A|

Next alpha

Street Name:
Highland Ave.|

Next alpha

Suite Number:
123|

Save alpha

1. Enter a house number and select **Next**. You can leave the house number blank.

2. Enter a street name and select **Next**.

3. Enter a suite number and select **Save** to return to the *Address* screen. If there is no suite number for the contact, leave it blank.

Today's Business

In this chapter:

Working With Activities

This section tells you:

- about activities (see below).
- how to view your daily appointments, calls, to-dos, email and leads (see *page 43*).
- how to schedule new appointments, calls, or to-dos (see *page 44*).
- how to mark activities done as you complete them (see *page 45*).
- how to link activities to contacts, listings or closings (see *page 45*).

About activities

There are three different types of activities in Top Producer SellPhone.

- **Independent activities** — These activities are not created from a contact, listing or closing. You can link this type of activity to a contact, a listing or a closing.
- **Contact-dependent activities** — These activities are created from a Top Producer 7i contact page or the Top Producer SellPhone *Contact menu* screen. For more information, see *"Contact menu" on page 35*. If the "owner" contact is deleted, the activity is also deleted.
- **Listing- or closing-dependent activities** — These activities are created from a Top Producer 7i listing or a closing page, or a Top Producer SellPhone Listing or Closing menu screen. For more information, see *"Listing menu" on page 66* or *"Closing menu" on page 72*. If the listing or closing is deleted, the associated activity will also be deleted. You cannot link one of these activities to another listing or closing.

About repeating activities

Repeating activities can be created in Top Producer 7i but not in Top Producer SellPhone. When you make a change to a repeating activity, (except for the date):

- you can choose whether to change just the one instance of the activity, or all instances of the activity.

- if you apply a change to a single repeating activity, such as the description, the activity will become unlinked from the group, becoming an independent activity.

When you make a <u>date</u> change to a selected activity in a repeating series of activities, <u>only</u> the selected activity's date will change. The activity will remain a part of the repeating series.

For more information, see *"Activities" on page 102*.

Note: You cannot link a repeating activity to a listing or closing.

About activities that are part of an action plan

When a marketing, listing or closing action plan is applied to a contact in Top Producer 7i, the activities that make up the plan are scheduled in sequence. If the listing or closing dates change, then the activity dates will change correspondingly.

If you delete a plan activity with a dependent subsequent activity, the subsequent activity will be rescheduled to occur on the date of the deleted activity.

Viewing an activity

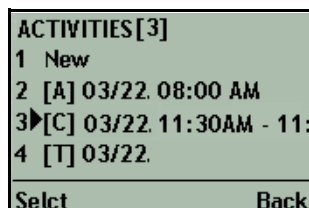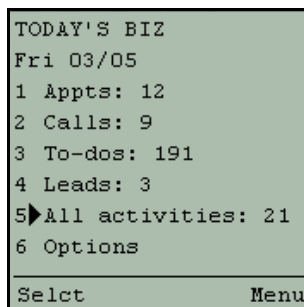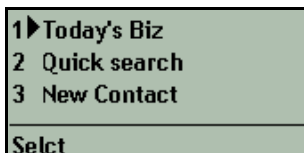You can look at your appointments, calls, to-dos, email and leads from Today's Business.
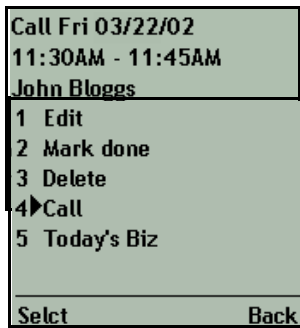
To view an activity:

```
1▶Today's Biz
2  Quick search
3  New Contact

Selct
```

1. Select **Today's Biz** from the main menu.

```
TODAY'S BIZ
Fri 03/05
1 Appts: 12
2 Calls: 9
3 To-dos: 191
4 Leads: 3
5▶All activities: 21
6 Options

Selct          Menu
```

2. Select **All activities** to view all your activities.

   A list of all your activities is displayed. If there are no activities for a particular category, that category will not be displayed.

```
ACTIVITIES[3]
1 New
2 [A] 03/22. 08:00 AM
3▶[C] 03/22. 11:30AM - 11:
4 [T] 03/22.

Selct          Back
```

3. Select an activity from the list.

   The activity details are displayed.

```
Call Fri 03/22/02
11:30AM - 11:45AM
John Bloggs
1  Edit
2  Mark done
3  Delete
4▶Call
5  Today's Biz


Selct          Back
```
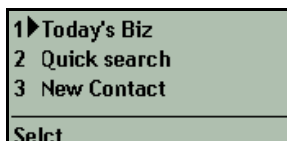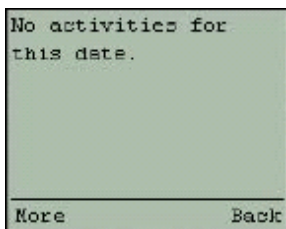
4. Select **More**.

5. You can **edit** the activity, mark it **done**, **delete** it, **call** a linked contact (if the linked contact has a phone number) or return to Today's business.
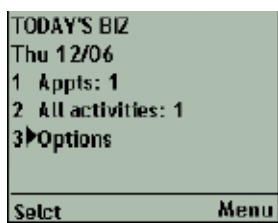
Adding a new activity

To add an activity:

```
1▶Today's Biz
2  Quick search
3  New Contact

Selct
```

1. Select **Today's Biz** from the main menu.

```
No activities for
this date.




More           Back
```

2. Select **More** if there are no activities for today, or,

```
TODAY'S BIZ
Thu 12/06
1  Appts: 1
2  All activities: 1
3▶Options

Selct          Menu
```

select **Options** if there are activities for today.

```
1▶New activity
2  Change day
3  Week view
4  Go to today
5  Menu

Selct          Bac
```

3. Select **New activity**.

```
1 Type: Appt
2 Desc: Client site
3 Date: 02/11/04
4 Start: 03:30PM
5 Finish: 03:45PM
6 Links: 0
7 Notes: 0
8 Delete
─────────────
Edit        Back
```
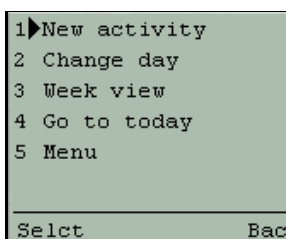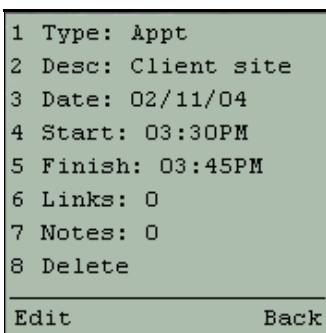
4. Enter a description and select **Save**.

5. You can enter or change the activity's **type**, **description**, **date**, **start** and **finish** time, **links** or **notes** as necessary.

Marking activities "done"

You should mark activities **done** as you complete them. Once activities are marked done they will no longer appear in Today's business. Activities are marked done from the **Activity** menu. For more information, see *"Activity menu" on page 51*.

Linking the activity to a contact, listing or closing

Main menu
Today's Biz
All activities
Select an activity
More
Edit
Links

or

Main menu
Today's Biz
All activities
New
Description
Links

```
Links (1):
1▶Contacts:1
2  Listings:0
3  Closings:0
─────────────
Selct       Back
```

Select **Links** from the *Create or edit an activity* screen to access the *Links* screen. From the *Links* screen you can link the activity to a contact, a listing or a closing, or view pre-existing links. You can link an activity to as many contacts as you want, and to either one listing or closing.
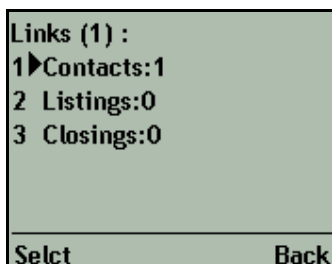
- **Contacts:** — view or link contacts. For more information, see *"Linking a contact" on page 45*.
- **Listings:** — view a linked listing or link the activity to a listing (see *"Linking a listing" on page 47*). This option will not be available for repeating activities or for activities created from a listing or a closing.
- **Closings:** — view a linked closing or link the activity to a closing (see *"Linking a closing" on page 47*). This option will not be available for repeating activities or for activities created from a listing or a closing.

Linking a contact

The *[Activity] contacts* screen displays contacts linked to the activity.

- **Add link** — link a contact to the activity.

To link one or more contacts to an activity:

1. Enter a contact name or part of a name and select **Find**. If you select **Find** without entering a name, your entire contact list will be displayed.

Main menu
Today's Biz
All activities
Select an activity
Edit
Links
Contacts

```
Link contact:
1▶Anderson, John
2 Cabral, John
3 Smith, John


Link        Cancl
```

2. Place the cursor next to the contact you want to link and select **Link** to link the contact.

```
Appt contacts:
1 Add link
2▶Smith, John

Selct        Back
```

3. The contact will be linked to the activity and you will be returned to the *[Activity] contacts* screen.

```
Smith, John:
1▶Unlink
2 View

Selct        Back
```

4. Select a linked contact if you want to remove the link or view the contact.

*   **Unlink** — unlink the contact.
*   **View** — view or dial the contact. For more information, *"Contact details" on page 35*.

```
Appt contacts:
1 Add link
2▶Smith, John

Selct        Back
```

Linking a listing

Appt listing
2499 Anna Dr, Santa Clar
1 ▶ Change link
2 Unlink
3 View

Selct   Back

Main menu
Today's Biz
All activities
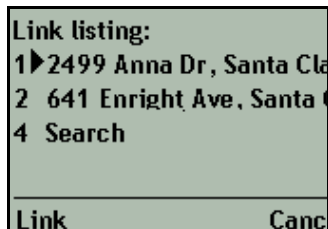Select an activity
More
Edit
Links
Listings
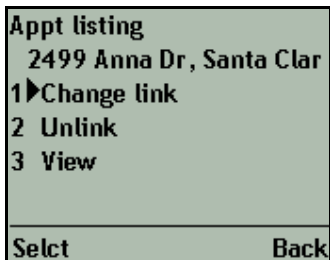
The *[Activity] listing* screen displays listings linked to the activity. If there is no listing linked to the activity, this screen will be bypassed and you will see the *Link listing* screen.

You can link only one listing to an activity; when you link a listing to an activity any listings or closings already linked to the activity will be un-linked.

- **Change link** — link a different listing to the activity using the *Link listing* screen.
- **Unlink** — unlink the listing.
- **View** — view the listing.
 Then do the following:

Link listing

Link listing:
1 ▶ 2499 Anna Dr, Santa Cla
2 641 Enright Ave, Santa
4 Search

Link   Cancl

1. Scroll through the list and select the appropriate listing or select **Search** to search for a listing. For more information, see .

2. The listing will be linked to the activity and you will be returned to the *[Activity] listing* screen. If a listing was previously linked to the activity, the original link will be replaced with the new listing.

Linking a closing

Appt closing
2499 Anna Dr, Santa Clar
1 ▶ Change link
2 Unlink
3 View

Selct   Back

Main menu
Today's Biz
All activities
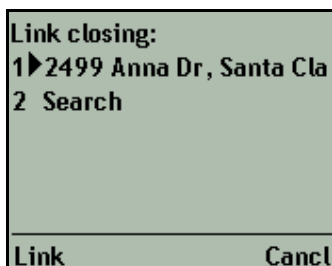Select an activity
Edit
Links
Closings
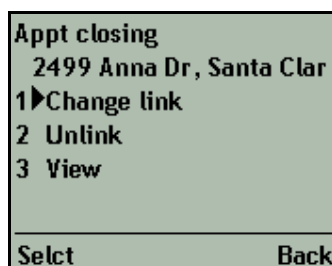
The *[Activity] closing* screen displays closings linked to the activity. If there is no closing linked to the activity, this screen will be bypassed and you will see the *Link closing* screen, below.

You can link only one closing to an activity; when you link a closing to an activity any listings or closings already linked to the activity will be un-linked.

- **View:** view the closing.
- **Unlink:** unlink the closing.
- To link a different closing to the activity, select **Change link** to display the *Link closing* screen. Then, follow the instructions on .

Link closing

Link closing:
1 ▶ 2499 Anna Dr, Santa Cla
2 Search

Link   Cancl

To link a closing to an activity:

1. Scroll through the list and select the appropriate closing; or select **Search** to search for a closing, (see *"Search for closings" on page 71*).

2. The closing will be linked to the activity and you will be returned to the *[Activity] closing* screen.

> **Note:** If a closing was previously linked to the activity, the original link will be replaced with the new closing.

Today's Business Screens

Today's business screen

```
TODAY'S BIZ
Thu 03/22
1  Appts: 1
2  Calls: 1
3  To Do: 1
4  Leads: 2
5 ▶All activities: 3
6  Options

Selct            Back
```

Today's business displays the appointments, calls, to-dos and email you have scheduled for today. It also displays how many new leads have been downloaded.

If there are no activities for a particular category, that category will not be displayed. If you have no activities for today, *"No activities for this date"* is displayed. Select **Options** to display the *Today's business options* screen.

You can select the following:

- **Appts**, **Calls**, **To-do:** display your scheduled activities for the selected type. For more information, see *"The Activity list" on page 50*.

- **Email:** display your scheduled email. For more information, see *"The Email list" on page 51*.

- **Leads:** Display new leads. For more information, see *"Lead list" on page 57*.

- **All activities:** display all your scheduled activities. For more information, see *"The Activity list" on page 50*.

- **Options:** Display *Today's business options*, allowing you to view activities for a different day or week. For more information, see *"Today's business options" on page 50*.

To create an activity, select the activity type you want to create, and then select **New** from the *Activity list*.

> **Note:** If a Call has a time assigned to it, it will appear as an **Appointment** under Today's business. For more information, see the **Set time/No time** options; *"Create or edit an activity" on page 52*.
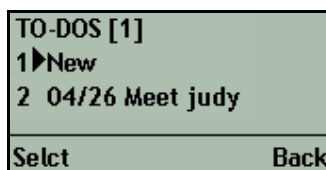
Today's business options
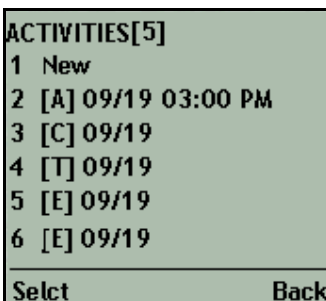
Main menu
Today's Biz
Options

```
1▶New activity
2  Change day
3  Week view
4  Go to today
5  Menu

Selct          Back
```
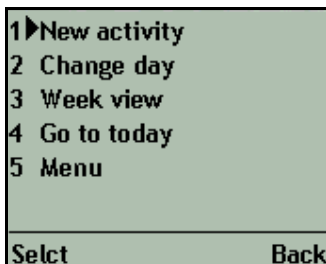
- **New activity** — add a new activity. For more information, see *"Create or edit an activity" on page 52*.
- **Change day** — view your activities for a different day.
- **Week view** — view a list of the days of the week. For more information, see *"The Week view" on page 53*.
- **Go to today** — view today's activities. For more information, see *"The Activity list" on page 50*.
- **Menu** — return to the *Main menu*.

The Activity list

Main menu
Today's Biz
All activities

```
TO-DOS [1]
1▶New
2  04/26 Meet judy

Selct          Back
```
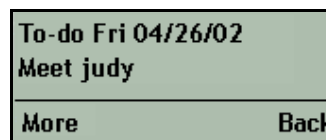
The *Activity list* screen displays a list of activities. If selected from Today's Business, activities will be listed for a particular day. If selected from a listing, closing or contact, all linked activities will be displayed. How activities are displayed depends on the settings in the *"Activities"* section of Top Producer SellPhone setup, see *"Activities" on page 102*.

```
ACTIVITIES[5]
1  New
2  [A] 09/19 03:00 PM
3  [C] 09/19
4  [T] 09/19
5  [E] 09/19
6  [E] 09/19

Selct          Back
```

When **All** activities is selected, the activities are labeled **[A]** for Appointment, **[C]** for Call, **[T]** for To-do, and **[E]** for email, as shown in the example on the left.

- **New** — create a new activity, of the same type as the list, or of the default type if you selected **All** or called the list from a contact, listing or closing. For more information, see *"*Appointment (this is the default setting)*"* on page 102.
- Select an activity to view it.

Main menu
Today's Biz
All activities
Select an activity

```
To-do Fri 04/26/02
Meet judy

More           Back
```

When you select an activity, the activity date and description are displayed.

- **More** — view activity details, **edit** or **delete** the activity, or mark it **done**. For more information, see *"Activity menu" on page 51*.

> **Note:** An activity's *"Remind me"* and *"Drop-off"* periods in Top Producer 7i will affect how long the activity is displayed in Top Producer SellPhone's Today's business. For more information, see Top Producer 7i's online Help or user guide.

The Email list

```
EMAIL[2]
1▶09/19 Reminder
2  09/19 Say Hi.

Selct            Back
```
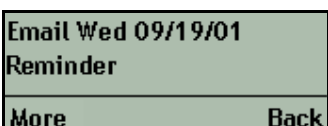
The **Email** list displays your scheduled email. If selected from Today's Business, activities will be listed for a particular day. If selected from a listing, closing or contact, all linked email will be displayed.
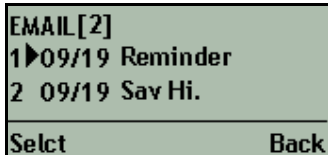
- Select an email to view it.

```
Email Wed 09/19/01
Reminder

More             Back
```

> **Note:** You cannot schedule an email in Top Producer SellPhone, so there is no *"New"* option in the **Email** list.

When you select an email, the email date, description, and number of links is displayed. If the email has been marked done, this is also displayed.

- **More** — **send**, **edit** or **delete** the email, or mark it **done**. For more information, see *"Email menu" on page 51*.

Activity menu

```
1▶Call
2  Edit
3  Mark done
4  Delete
5  Today's Biz

Selct            Back
```
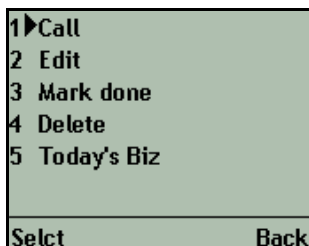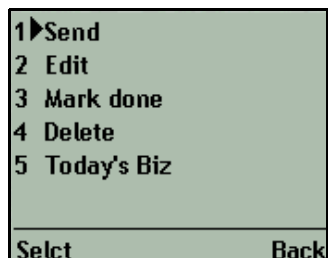
- **Call** — call the contact who is linked to the selected activity (call, to-do, or appointment). For more information on linking contacts, see *"Linking a contact" on page 45*.
- **Edit** — edit the selected activity. For more information, see *"Create or edit an activity" on page 52*.
- **Mark done/unmark** — mark the activity **done**, or unmark the activity if it is marked **done**.

> **Note:** Email activities marked done will not appear in the Today's business activity list. If you have selected **Display in lists - marked done activities** (see *"Under Display in lists…, select:" on page 103*), marked done activities will be displayed when viewing activities linked to a contact, listing or closing.

- **Delete** — delete the activity.
- **Today's Biz** — return to the *Today's business* screen.

Email menu

```
1▶Send
2  Edit
3  Mark done
4  Delete
5  Today's Biz

Selct            Back
```

- **Send** — send the email. This also marks the email activity done.
- **Edit** — edit the email activity. For more information, see *"Edit email activity"* below.
- **Mark done** — mark the email activity done. If you have marked an email as "done", it does not result in the email

being sent. Email activities cannot be unmarked done in Top Producer SellPhone; only in Top Producer 7i.

- **Delete** — delete the email activity.
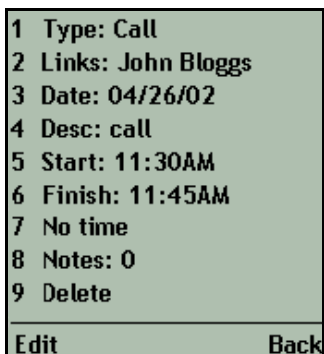- **Today's Biz** — return to the *Today's business* screen.

Edit email activity

Main menu
Today's Biz
Emails
Select an email
More
Edit

```
1 ▶Desc:Reminder
2  Date:09/19/01
3  Auto send:(N)
4  Links:1
5  Notes:0


Edit              Back
```
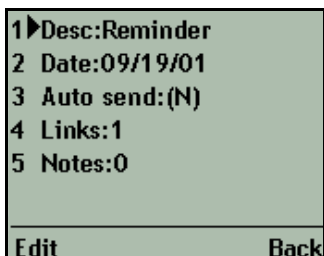
- **Description:** — edit the email activity description.
- **Date:** — edit the email activity date.
- **Auto send:** — toggle between auto-sending email (**Y**) and not auto-sending email (**N**). When set to (**Y**), email will be sent automatically on the email activity date.
- **Links:** — select this option to view contacts, listings or closings linked to the email activity, or to link a contact, listing or closing. For more information, see *"Leads" on page 55*.
- **Notes:** — displays the number of notes associated with the email activity. Select this option to enter notes for the email activity.

Create or edit an activity

Main menu
Today's Biz
All activities
Select an activity
More
Edit

or

Main menu
Today's Biz
All activities
New
Description

```
1  Type: Call
2  Links: John Bloggs
3  Date: 04/26/02
4  Desc: call
5  Start: 11:30AM
6  Finish: 11:45AM
7  No time
8  Notes: 0
9  Delete

Edit              Back
```

The *Create/edit activity* screen lets you create or edit an activity. Depending on the type of activity being created or edited, not all options shown may be available.

If the activity is a recurring activity, you can choose to apply changes to the current activity only, or to all repetitions of the activity. For more information, see *"Activities" on page 102*.

- **Type:** — choose the activity's type. You can choose **Appointment**, **Call** or **To-do**.
- **Links:** — link the activity to a contact, listing or closing. For more information, see *"Leads" on page 55*.
- **Date:** — change the date for the activity.
- **Desc:** — enter or edit a description of the activity.
- **Start** or **Finish:** — define the time period for the activity. These options will not be available if the activity is a To-do. For more information, see *"Set start or finish time" on page 53*.
- **No time/Set time:** — (only available for call activities).
- **No time:** — Select this option if the call does not require a time. The **Start** and **Finish** options will become unavailable.
- **Set time:** — Select this option if the call requires a time. The **Start** and **Finish** options will become available.

> **Note:** When you assign a time to a call using the **Set time** option in Top Producer SellPhone, or enter a time when creating the call in

Top Producer 7i, the call will be displayed under **Appointments** in Today's business, not under **Calls**.

- **Priority:** — enter a priority for the activity. 1 is highest, 99 is lowest.

> **Note:** This option is only available for <u>untimed</u> activities.

- **Notes:** — enter notes for the activity.
- **Delete:** — delete the activity.

> **Note:** If you delete or mark done an activity that is part of an action plan and that has dependent activities, the subsequent activity in the plan will have its date adjusted to the date of the deleted or marked done activity.

Set start or finish time

Main menu
Today's Biz
All activities
Select an activity
More
Edit
Start/Finish

or

Main menu
Today's Biz
All activities
New
Description
Start/Finish

To set the start or finish time for the activity, do the following.

- Select **AM** or **PM**.
- Enter the time you want the activity to start or finish, then select **Save** to return to the *Create/edit activity* screen. In this example, to enter a time of 4:20, you would press 0420 on your phone's keypad.

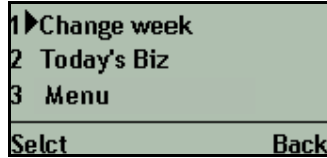## The Week view

Main menu
Today's Biz
Options
Week view

The *Week view* screen displays the numbers of activities for every day of the selected week. Simply select a day of the week to view all activities for that day.

> **Note:** If you set your SellPhone preferences to display **Days without activities** in Top Producer 7i, then the days with zero **[0]** activities will be visible, (for example item 7 in the screenshot). If, however, you have <u>NOT</u> selected the **Days without activities** check box in Top Producer 7i, then only those days with activities will be visible (item 7 will <u>NOT</u> be displayed). For more information on setting how activities will

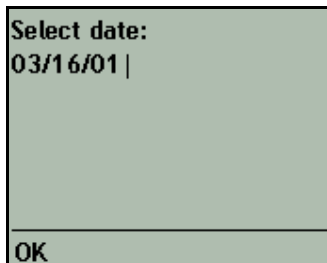appear on the *Week view* screen, see *"Display in lists & Week view", on page 103*.

To change the view to a different week, do the following:

Main menu
Today's Biz
Options
Week view
More

```
1▶Change week
2  Today's Biz
3  Menu
Selct          Back
```

1. Select **- Next -** or **- Previous -** to move forward or back a week, or select **More**.

2. Select **Change week**.

Main menu
Today's Biz
Options
Week view
More
Change week

```
Select date:
03/16/01 |



OK
```

3. Enter the date you want the new week view to start from, in the form month, day, year (MM/DD/YY), then select **OK** to return to the *Week view* screen and display the new week.

> **Note:** You can choose whether you want the week view to start on Monday or Sunday. For more information, see *"Display in lists & Week view" on page 103*.

Leads

In this chapter:

Viewing A Lead

You can use the *Leads* feature to:

- search for and view leads.
- call a lead.
- follow up on a lead.
- view a lead's contact details.

You cannot create leads inside Top Producer SellPhone. Leads are created or received inside Top Producer 7i. For information about **Lead Alerts**, see .

To view a lead:

```
LEADS
1  Search
2▶New Leads [2]
3  Followed Up [1]
4  List All
─────────────────
Selct         Back
```

1. Select **Leads** from the *Main menu*. The *Leads summary* screen displays how many leads you have. Select **New Leads [x]** to view your new leads.

```
LEADS
1▶Forester, Jack
2  Jones, Betty




─────────────────
Selct         Back
```

2. A list of your new leads is displayed. Select a lead from the list to view it.

```
LEAD:
Betty Jones
Rcvd: 08/19/03
Tel: 555-4149879 h
Src: Agent personal
web page
─────────────────
More          Back
```

3. The lead details are displayed. Select **More** for further options.

```
1▶Dial
2  Email
3  Follow up
4  Notes: 0
5  Details
6  Delete
7  Leads
─────────────────
Selct         Back
```

4. You can **Dial** the lead (if it has a contact number), **Email** the lead (if it has an email address), select **Follow up** to mark the lead as followed up after you have followed up the lead, view the lead's **Notes**, contact **Details**, **Delete** the lead, or return to the *Leads* screen.

The Leads Screens

Leads

```
LEADS
1  New leads [0]
2  Followed up [0]
3  List all [0]
4▶Search
5  Menu

Selct            Back
```
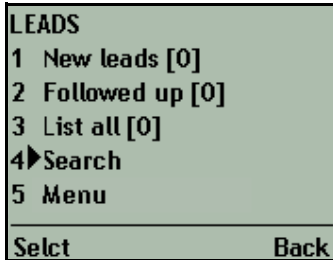
Select **Leads** from the *Main menu* to display the *Leads* screen.

The total number of leads in each category is displayed.

- **New leads** — display all leads that have not yet been followed up. For more information, see *"Lead list"* below.
- **Followed up** — display all followed up leads. For more information, see *"Lead list"* below. For information on following up on leads, see *"Follow up" on page 59*.
- **List all** — display all leads. For more information, see *"Lead list"* below.
- **Search** — search for a lead. For more information, See *"Lead search"* below.
- **Menu** — return to the main menu.

Lead search

Main menu
Leads
Search

```
SEARCH
1▶Name:
2  Status:
3  Clear search

Selct            Find
```

Search your lead list by name or status, or a combination of both.
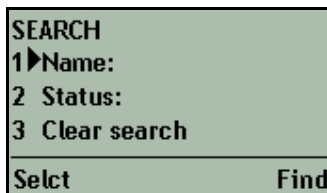
- **Name:** — enter a name or part of a name. You can only search on the first part of a name (i.e. to find "Stephen", search using "Step", but not "phen"). You can also search for a lead by using the first part of the company name specified for the lead.
- **Status:** — select **New leads** or **Followed up**.
- **Clear search:** — clear the current search terms
- **Find** — start the search and display the results. See *"Lead list"* below.

Lead list

Main menu
Leads
List all

```
LEADS
1▶Forester, Jack
2  Jones, Betty




Selct            Back
```

- Select a lead to view it. The *Lead details* screen is displayed. For more information, see *"Lead details" on page 58*.
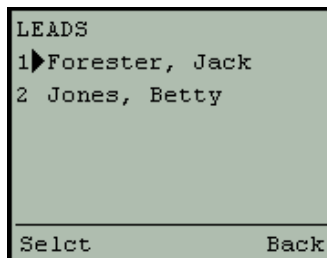
```
LEAD:
Betty Jones
Rcvd: 08/19/03
Tel: 555-4149879 h
Email:
bjones@hotemail.com
Src: Agent personal
web page
Stat: New lead
Note: /19/2003
03:04PM by – Looking
for a 2 bedroom house
More              Back
```

Lead details

The *Lead details* screen displays the following information:

- Lead contact name
- Date the lead was received
- Lead phone number
- Lead email address (if available)
- Lead source
- Lead status
- Lead note

Select **More** to display the *Lead menu* screen. For more information, see *"Lead menu"* below.

Lead menu

```
1  Dial
2  Email
3  Follow up
4  Notes: 0
5  Details
6  Delete
7  Leads

Selct             Back
```

From the *Lead menu* screen you can do the following:

- **Dial** — call the contact. This option is not available for leads that do not have a phone number.

- **Email:** send an email to the contact. For more information, see *"Composing a message" on page 82*.

  > **Note:** The Email option is only available if you have set up your email address on the *Agent setup* page of Top Producer 7i; AND if the selected contact has an email address specified.
  >
  > If the selected contact does NOT have an email address entered, use the *Add email* screen via the **Details** option to enter this information.

  - If the contact has multiple email addresses, you will be able to select the address you want from the list.

  > **Note:** If the contact has multiple email addresses and you have the *"Always use primary email address…"* setting selected, the primary email address will be used. For more information, see *page 105*.

- **Follow up** — when you have completed a follow-up call for the new lead, select **Follow up** to mark the lead as *"Followed up"*. This will remove the lead from the **New Leads** category and place a marked done activity in the lead's con-

tact history. This option is only available for new leads. For more information, see *"Follow up" on page 59*.

- **Notes:** — view or edit the lead's notes.
- **Details** — view the lead's contact details, or link an activity to the lead. For more information, see *"Contact details" on page 35*.
- **Delete** — delete the lead.
- **Leads** — return to the *Leads* screen. For more information, see *"Leads" on page 57*.

Follow up

Main menu
Leads
Lead list
Lead details
Lead menu
Follow up

Log Call and Change Status to Followed-Up?|

YES   **NO**

When you have followed up on a lead, select **Yes** to mark the lead *"Followed up"*. Depending on your preference setting in Top Producer SellPhone preferences (for more information, see *"Display in lists & Week view" on page 103*), a **Call**, **Appointment** or **To-do** that is marked done will be entered in the contact history.

> **Note:** The created activity will be marked done, so it will not appear in Today's Business as an activity requiring action. You should use this feature AFTER you have followed up the lead. This differs from Top Producer 7i, where following up a lead creates an activity that is NOT marked done.

The lead will be marked as **Followed up**. Followed up leads no longer appear in the Lead list as a **New Lead**, but can be viewed by selecting **Followed up** from the *Leads summary* page.

> **Note:** A lead will also be marked *"Followed up"* if you mark done an activity that has been linked to it. For more information, see *"Activity menu" on page 51*.

Lead Alerts

About Short Message Service (SMS)

Short Message Service (SMS) is the ability to send and receive short text messages from a mobile phone. If you have an SMS-capable cell phone, Top Producer SellPhone can alert you when a lead is received in Top Producer 7i. The type of alert depends on your specific mobile phone, and may be a beep, vibration, light, or message.

> **Note:** Lead Alerts will inform you of customer-entered leads (for example, someone interested in one of your Realtor.com® Marketing System properties or an inquiry form). The alerts do not include leads entered by agents or assistants in Top Producer 7i.

Activating Lead Alerts

To use Lead Alerts you must enable it in Top Producer SellPhone preferences and enter your SMS user information. For instructions on enabling Lead Alerts, see *"Enabling Lead Alerts" on page 98*.

Your cellular provider and mobile phone must support SMS, and in most cases you must ask your cellular provider to activate the service. Please contact your cellular provider for information on activating SMS and supported mobile phones.

Receiving a lead

```
LEAD:
John Smith
604-555-5555
Open SellPhone
```

When a lead is received, your mobile phone will alert you (how this is done will depend on the type of phone you have). You may have to access the alert from a particular folder or menu on your mini browser. Please refer to your phone documentation for more information.

For each lead received from Realtor.com or a lead inquiry form, the alert will display: **first name**, **last name** and **phone number**.

When you receive a lead alert, log into Top Producer SellPhone, select **Leads** from the *Main menu*, then select **New Leads** to view the lead (which will have **New** status). See *"Leads" on page 57* for more information.

About Realtor.com Marketing System

Leads are generated from your Realtor.com Marketing System web site. For more information about Realtor.com Marketing System, please refer to http://www.realtor.com (in Canada, refer to http://www.homestore.ca).

Lead Alerts for Assistants

If you are an assistant and you have been given access to receive lead alerts (enabled from the *SellPhone preferences* page in Top Producer 7i), you will receive lead alerts for leads.

For leads received from Realtor.com or a lead inquiry form, the alert will display: **first name**, **last name** and **phone number**, appearing similar to the text message sent to your agent, (see *"Receiving a lead" on page 60*).

> **Note:** How the alert is presented depends on the type of phone you have.

Listings

In this chapter:

Viewing A Listing

You can use the Listings feature to:

- view your listings.
- view sellers.
- view property information.
- view associated activities and linked closings.

Listings can only be created or deleted using Top Producer 7i. You can <u>NOT</u> create or delete a listing from Top Producer SellPhone.

To view a listing:

1. Select **Listings** from the *Main menu*.

   The *Listings summary* screen displays how many listings you have. Select **Search**. You can also select **List all** to view all your listings.

2. Select your search criteria. You can search by date range (**From** and **To**), by present/future home price range (**Min price** and **Max price**) or by **Status**. In this example, **From** is selected to search by date range.

3. Enter a **start date** (MM/DD/YY) and select **Next**.

4. Enter an **end date** (MM/DD/YY) and select **Apply**.

SEARCH LISTINGS:
1 From: 03/16/01
2 To: 05/16/01
3 Min price:
4 Max price:
5 Status: All

Selct   Find

5. When you have entered all your search criteria, select **Find**.

LISTINGS:
1▶2499 Anna Dr, Santa Cla
2 641 Enright Ave, Santa C

Selct   Back

6. Listings matching your search criteria are displayed. Select a listing to view it.

▷2499 Anna Dr, Santa
Stat: Active
$250,000
MLS 344334
Seller: John Anderson
Listed 04/04/01
Expiry 06/03/01
Comm-n: $12,500
Source: James
Remind: 05/19/01
Activities: 1
Notes: 1

More   Back

7. The listing details are displayed. Select **More** for further options.

1▶Notes: 1
2 Seller: 1
3 View closing
4 Property
5 Activities: 2
6 Stop reminders

Selct   Back

8. You can view listing **notes**, the property **seller**, an associated **closing** (if relevant), **property** information, or associated **activities**. Select **Stop reminders** to prevent activities associated with this listing from being displayed in Today's business.

The Listings Screens

Listings summary

To display the *Listings summary* screen, select **Listings** from the *Main menu*.

```
LISTINGS [8]
1▶List all
2 Search
3 Menu

Selct              Back
```

The first line of the *Listings summary* screen displays the total number of listings available. From this screen you can do the following:

- **List all** — view all your listings. For more information, see *"The Listings list" on page 65*.
- **Search** — search by date or price. For more information, see *"Search for listings" on page 65*.
- **Menu** — select to return to the main menu.

Search for listings

```
SEARCH LISTINGS:
1 From: 12/31/01
2 To: 12/31/01
3 Min price:
4 Max price:
5 Status: All
6 Clear search
7 Back

Selct              Find
```

You can search for listings after a start date, before an end date, up to and including a price limit, or a combination of all three.

- **From:** — enter a start date (MM/DD/YY).
- **To:** — enter an end date (MM/DD/YY).
- **Min price:** — enter a lower price limit.
- **Max price:** — enter an upper price limit.
- **Status:** — select a listing status. Choose from **All**, **Active**, **Expired**, **Pending (showing)**, **Pending (not showing)**, **Pending/Firm**, **Closed/Paid**, **Withdrawn**, **Cancelled**, **Closed/Paid Transferred** and **Pending/Backup**.
- **Clear search:** — erase all the search terms.
- **Back:** — return to the *Listings summary* screen.
- Select the **Find** Soft key to display the results of your search.

The Listings list

```
LISTINGS:
1▶2499 Anna Dr, Santa Cla
2 641 Enright Ave, Santa C

Selct              Back
```

The *Listings* list displays all your listings or the results of your listings search.

- Select a listing to view it. For more information, see *"Listing details" on page 66*.

> **Note:** Listings can be displayed by address or seller name. For more information, see *"Listings & Closings" on page 106*. If listings are being displayed by address and a listing has no address, the listing will be displayed as **No address**.

Listing details

Main menu
Listings
Listings list
Listing details

```
▷2499 Anna Dr, Santa
Stat: Active
$250,000
MLS 344334
Seller: John Anderson
Listed 04/04/01
Expiry 06/03/01
Comm-n: $12,500
Source: James
Remind: 05/1 9/01
Activities: 1
Notes: 1
More              Back
```

Select a listing from the *Listings* screen using **Listing search** or **List all**.

The *Listing details* screen displays the following <u>view-only</u> information, if available:

- Listing address
- Listing status
- List price
- MLS number
- Seller name or number of sellers if there are more than 1
- Date of listing
- Date of expiry
- Commission
- Source of the listing
- Reminder date for the listing
- Number of associated activities (if any)
- Number of associated notes (if any)

You can select:

- **More** — display the *Listing menu*.

Listing menu

Main menu
Listings
Listings list
Listing details
Listing menu

```
1  Notes: 0
2▶Seller: 1
3  View closing
4  Property
5  Activities: 1
6  Stop reminders
Selct             Back
```

You can select the following from the *Listing menu* screen:

- **Notes:** — view, add, or delete listing notes for the selected property listing. For more information, see *"Listing notes" on page 67*.
- **Sellers:** — display the contact details for the property seller or sellers. If there are multiple sellers, you can select which seller to view. For more information, see *"Contact details" on page 35*.
- **View closing:** — display the corresponding closing details, if applicable.
- **Property:** — display the listed property's details. For more information, see *"Property information" on page 67*.

- **Activities:** — View and modify existing activities associated with the listing, or create a new activity for this listing. For more information, see *"The Activity list" on page 50*.

- **Show/stop reminders:** — Select this to toggle between **Show reminders** and **Stop reminders** for the listing. If set to **Show reminders**, activities for this listing are displayed in *Today's business.* If set to **Stop reminders**, activities for this listing are not displayed.

Listing notes

Main menu
Listings
Listings list
Listing details
Listing menu
Listing notes

```
Listing notes
1▶New
2  8 shown
3  Much interest



Selct              Back
```

The *Listing notes* screen lists all notes associated with the listing. You can do the following:

- Select **New** to enter a new listing note. When you have entered the note, select **Save**.

- To view a note, select it.

- To edit a note, select it, then select **More**. Select **Edit**. When you have finished editing the note, select **Save**.

> **Note:** If you enter a note that exceeds 256 characters, you will NOT be able to edit it in Top Producer SellPhone. Instead, you will see the "Unable to edit long value" message.

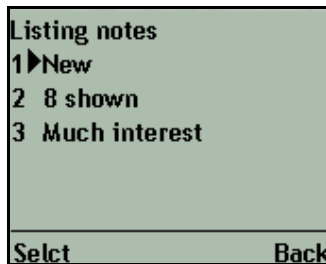- To delete a note, select it, then select **More**. Select **Delete**.

Property information

Main menu
Listings
Listings list
Listing details
Listing menu
Property details

```
2499 Anna Dr
Santa Clara, CA
95050
Bedrooms: 3
Bathrooms: 3
Sq. feet: 1200
Area: West end
within 1 mile to schools
Built: 1980

Back
```

The *Property* screen displays the following view-only details of the listed property, if available:
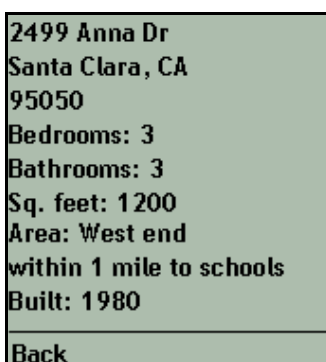
- Address
- Number of bedrooms
- Number of bathrooms
- Square footage
- Location of property (area)
- Relative location to schools
- Year built

Select **Back** to return to the *Listing* screen.

Closings

In this chapter:

Viewing A Closing

Use the Closings feature to:

- view your closings
- view closing parties
- view property information
- view associated activities and linked listings

Closings can only be created or deleted inside Top Producer 7i. You cannot create or delete a closing from Top Producer SellPhone.
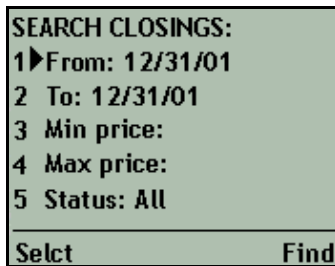
To view a closing:

```
CLOSINGS [8]
1▶List all
2 Search
3 Menu

Selct              Back
```
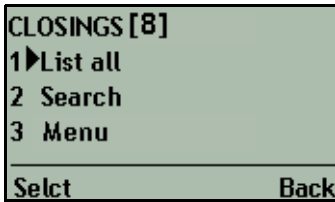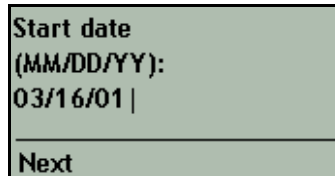
1. Select **Closings** from the *Main menu*.

   The *Closings* screen displays how many closings you have.

2. Select **Search**. You can also select **List all** to view all your closings.

```
SEARCH CLOSINGS:
1▶From: 12/31/01
2 To: 12/31/01
3 Min price:
4 Max price:
5 Status: All

Selct              Find
```

3. Select your search criteria. You can search by date range (**From** and **To**), present/future home price range (**Min price** and **Max price**) or **Status**. In this example, **From** is selected to search by date range.

```
Start date
(MM/DD/YY):
03/16/01 |

Next
```

4. Enter a **start date** (MM/DD/YY) and select **Next**.

```
End date
(MM/DD/YY):
05/16/01 |

Apply
```
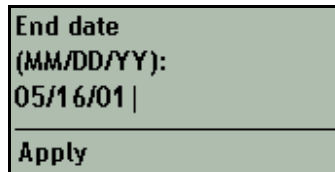
5. Enter an **end date** and select **Apply**.

```
SEARCH CLOSINGS:
1▶From: 12/31/01
2  To: 12/31/01
3  Min price:
4  Max price:
5  Status: All

Selct              Find
```

6. When you have entered all your search criteria, select **Find**.

```
CLOSINGS
1▶1500 Maple Drive,
2  45 Chestnut Drive,




Selct              Back
```

7. Closings matching your search are displayed. Select a closing to view it.

```
▷1500 Maple Drive, Ne
$450,000
Seller: John Anderson
Buyers: 0
 Stat: Pending (showi
Acpt: 08/19/03

More               Back
```

8. The closing details are displayed. Select **More** for further options.

```
1▶Notes: 0
2  Parties: 1
3  View listing
4  Property
5  Activities: 0
6  Stop reminders

Selct              Back
```

9. You can view closing **Notes**, the closing **Parties**, an associated **Listing**, the closing **Property**, associated **Activities**. Select **Stop reminders** to prevent activities associated with this closing from being displayed in *Today's business.* Select **Back** to return to the *Closing list* screen.

The Closings Screens

Closings summary

```
CLOSINGS [8]
1 ▶List all
2  Search
3  Menu

Selct            Back
```

Select **Closings** from the *Main menu* to display the *Closings summary* screen.

The first line of the *Closings summary* screen displays the total number of closings available. From this screen you can do the following:

- **List all** — view all your closings. For more information, see *"The Closings list" on page 71*.
- **Search** — search by date or price. For more information, *"Search for closings" on page 71*.
- **Menu** — return to the main menu.

Search for closings

```
SEARCH CLOSINGS:
1  From: 12/31/01
2  To: 12/31/01
3  Min price:
4  Max price:
5  Status: All
6  Clear search
7  Back

Selct            Find
```

You can search for closings occurring over a date range, up to and including a price limit, or a combination of both.

- **From:** — enter a start date in the format MM/DD/YY.
- **To:** — enter an end date in the format MM/DD/YY.
- **Min price:** — enter a minimum price.
- **Max price:** — enter a maximum price.
- **Status:** — select a closing status. Choose from **All**, **Pending(showing)**, **Pending (not showing)**, **Pending/Firm**, **Closed/Paid**, **Fell Thru**, **Pending/Backup**, and **Closed/Paid Transferred**.
- **Clear search:** — erase all the search terms.
- **Back:** — return to the *Closings* screen.
- Select the **Find** Soft key to display the results of your search.

The Closings list

```
CLOSINGS:
1 ▶123 Maple, Vancouver,
2  2499 Anna Dr, Santa Cla

Selct            Back
```
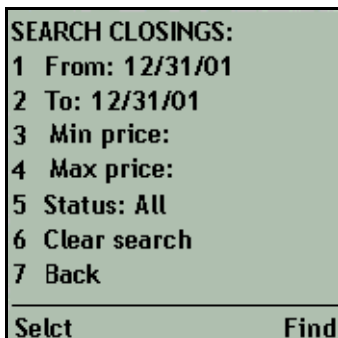
The *Closings* list displays all your closings or the results of your closings search.

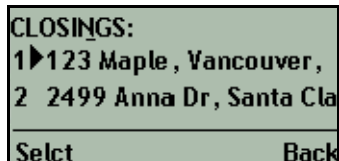Select a closing to view it. For more information, see *"Closing details" on page 72*.
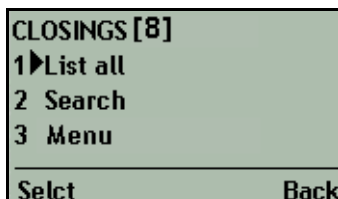
> **Note:** If a closing has no address, it will be displayed
> as **No address** in the *Closings* list.

Closing details

```
▷1500 Maple Drive, Ne
$450,000
Seller: John Anderson
Buyers: 0
 Stat: Pending (showi
Acpt: 08/19/03

More            Back
```

Select a closing from the *Closings* screen, using **Closing search** or **List all**.

The *Closing details* screen displays the following <u>view-only</u> information:

- Closing address
- Closing price and MLS number
- Seller name or number of sellers if there are more than 1
- Buyer name or number of buyers if there are more than 1
- Closing status
- File number
- Source
- Acceptance date
- Closing date
- Possession date
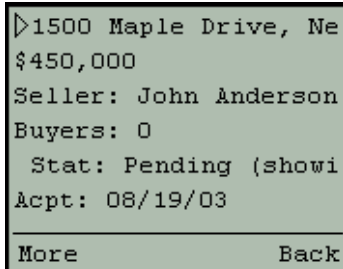- Commission amount

You can select:

- **More** — display the *Closing menu*.

Closing menu

```
1▶Notes: 0
2 Parties: 2
3 View listing
4 Property
5 Activities: 0
6 Stop reminders

Selct            Back
```
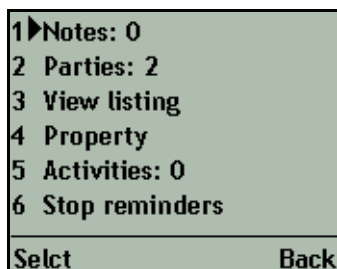
You can select the following from the *Closing menu* screen:

- **Notes:** — view, add, or delete closing notes for the selected property. For more information, see *"Closing notes" on page 73*.
- **Parties:** — view the parties associated with the closing. For more information, see *"Closing parties" on page 73*.
- **View listing:** — view the associated listing, if applicable.
- **Property:** — display the property's details. For more information, see *"Property information" on page 67.*
- **Activities:** — view and modify existing activities associated with the closing, or create a new activity for this closing. For more information, see *"The Activity list" on page 50*.
- **Show/stop reminders:** — select this to toggle between **Show reminders** and **Stop reminders** for the listing. If set to **Show reminders**, activities for this listing are displayed in Today's business, if set to **Stop reminders**, activities for this listing are not displayed.
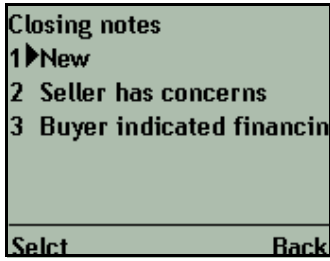
Closing notes

```
Closing notes
1▶New
2  Seller has concerns
3  Buyer indicated financin



Selct              Back
```

The *Closing Notes* screen lists all notes associated with the closing. You can do the following:

- Select **New** to enter a new closing note. When you have entered the note, select **Save**.
- To view a note, select it.
- To edit a note, select it, then select **More**, then select **Edit**. When you have finished editing the note, select **Save**.

> **Note:** If you enter a note that exceeds 256 characters, you will <u>NOT</u> be able to edit it in Top Producer SellPhone. Instead, you will see the "Unable to edit long value" message.

- To delete a note, select it, then select **More**, then select **Delete**.

Closing parties

```
1▶John Anderson (seller)
2  James Bay (buyer)




Selct              Back
```
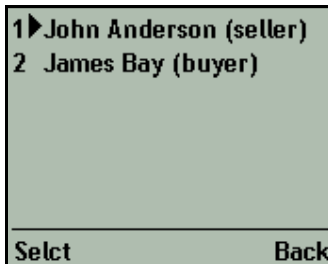
The *Closing Parties* screen lists all parties involved in the closing, and their role.

- Select a party to view its contact details.

Email

In this chapter:

Checking And Sending Email

You can use Email to:

- send and receive email on your phone.
- manage email folders.

EMAIL
1 ▶ Inbox (2u/5t)
2 Folders
3 Compose msg.
4 Trash
5 Drafts
6 Options

Selct   Menu

To check your email:

1. Select **Email** from the *Main menu* to display the *Email menu*, then select **Inbox**.

INBOX (1u/3t)
1 Check email
2 Compose msg.
3 *Need some info 09/19/0
4 Good news! 09/19/01
5 ▶ Hello! 09/19/01
6 Email main menu

Selct   Back

2. Select a message to view it.

Subj: Information?
▷ From: chris @aol.com
  To: mark @topproduc
Date: 09/22/03
Hi,
Please send me some info
More   Back

3. The message is displayed. Select **More** for further options.

MSG. ACTIONS
1 Reply
2 Reply to all
3 Forward
4 Delete
5 Move to
6 Mark unread
7 Linked contact(s)

Selct   Back

4. You can **reply** to the message, **forward** or **delete** it, **move** it to another folder, or **link** contacts to it.

To send an email:

```
1  Inbox (1t)
2  Folders
3▶Compose msg.

Selct              Menu
```

1. Select **Email** from the main menu to display the **Email** menu, then select **Compose message**.

```
COMPOSE
1▶To:
2  Subject:

Selct              Send
```

2. Select **To:**.

```
To:
1▶Enter Addr.
2  Ins. Contact

Selct              Back
```

3. Select **Enter Addr**. Alternatively, you can select **Ins. Contact** and search for a contact in your database.

```
To:
jbay@site.com|

OK                 alpha
```

4. Enter an email address, then select **OK**.

```
COMPOSE
1  To:jbay@site.com
2  Subject:An interesting
3▶Message:

Selct              Send
```

5. Select **Subject**.

```
SUBJECT:
1▶Enter subj.
2  Insert quick subj.

Selct              Back
```

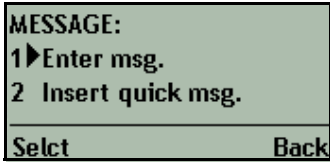6. Select **Enter Subj**. Alternatively, you can select one of the pre-written "quick subjects".

```
SUBJECT
An interesting property|

OK                 alpha
```
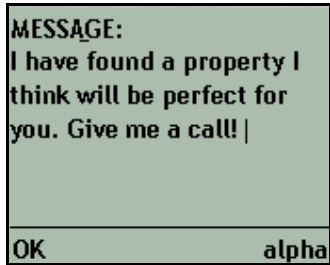
7. Enter a subject and select **OK**.

```
COMPOSE
1  To:jbay@site.com
2  Subject:An interesting
3▶Message:

Selct              Send
```
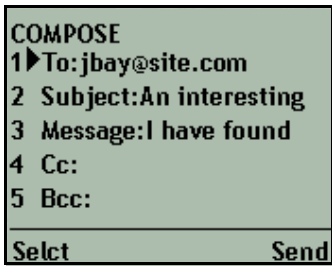
8. Select **Message:**.

```
MESSAGE:
1▶Enter msg.
2  Insert quick msg.

Selct              Back
```

9. Select **Enter Msg**. Alternatively, you can select one of the pre-written "quick messages".

```
MESSAGE:
I have found a property I
think will be perfect for
you. Give me a call! |


OK                alpha
```

10. Type a message, then select **OK**.

```
COMPOSE
1▶To:jbay@site.com
2  Subject:An interesting
3  Message:I have found
4  Cc:
5  Bcc:

Selct              Send
```

11. Press the **Send** Soft key.
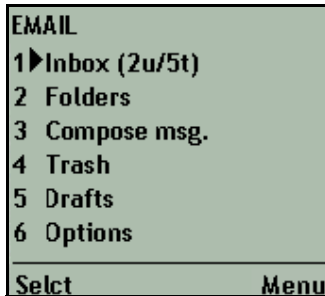
```
Your mail has been sent.
_____
OK
```
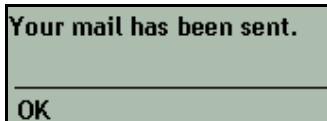
12. Your email is sent. Select **OK** to return to the **Email** menu.

The Email Menu

Select **Email** from the main menu to access the **Email** menu.
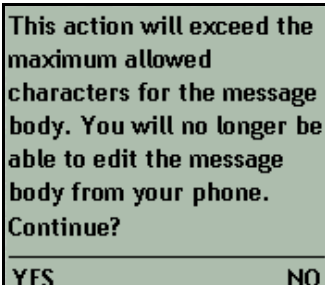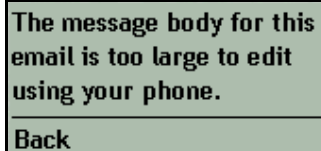
```
EMAIL
1▶Inbox (2u/5t)
2  Folders
3  Compose msg.
4  Trash
5  Drafts
6  Options

Selct          Menu
```

> **Note:** If you have not set up your email preferences in Top Producer 7i, you will not be able to send or receive email. Log into Top Producer 7i, point to **Email**, and then click **My Email**. For more information about setting up email, see Top Producer 7i's User Guide or online Help.

You can select the following:

- **Inbox** — view your email messages. The number of unopened (**u**) and total number (**t**) of messages is displayed. For more information, see *"Inbox" on page 79*.
- **Folders** — create email folders and view their contents. For more information, see *"Folders" on page 87*.
- **Compose Msg.** — write an email message. For more information, see *"Composing a message" on page 82*.
- **Trash** — view the trash folder. For more information, see *"Trash" on page 88*.
- **Drafts** — view the drafts folder. For more information, see *"Drafts" on page 88*.
- **Options** — configure email options, including quick messages and subjects, how messages are sorted, and auto-responder options. For more information, see *"Options" on page 90*.

```
The message body for this
email is too large to edit
using your phone.

Back
```

```
This action will exceed the
maximum allowed
characters for the message
body. You will no longer be
able to edit the message
body from your phone.
Continue?

YES              NO
```

Email Size Limit

Top Producer SellPhone is limited to editing email message sizes of up to 256 characters. If you try to edit a message that is longer than 256 characters, a warning message will alert you that the length of the message is too large to edit.

If you take an action that will result in a message size of greater than 256 characters (such as inserting a quick message or signature, or saving a large reply or forward message to the drafts folder), a warning message will alert you that you will not be able to edit the message body on the phone. Select **YES** to continue with the action, **NO** to return to the previous screen.

Working With Incoming Messages

Inbox

```
INBOX (1u/3t)
1  Check email
2  Compose msg.
3  *Need some info 09/19/0
4  Good news! 09/19/01
5▶Hello! 09/19/01
6  Email main menu

Selct              Back
```

Use the Inbox to view your new email messages. The number of unread (**u**) messages and total number (**t**) of messages are indicated.

- **Check Email** — retrieve new email.

  > **Note:** When you first go to the Inbox, your mail is automatically retrieved. Use **Check Email** if you leave the Inbox open for a long time and want to check for new mail.

- **Compose Msg.** — write an email message. For more information, see *"Composing a message" on page 82*.
- Select a **Message** to read it. For more information, see *"View message" on page 79*.
- **Email Main Menu** — return to the **Email** menu.

  > **Note:** Email is sorted according to the **Sort options** feature when setting up your email options in Top Producer SellPhone. For more information, see *"Sort options" on page 91*.

View message

```
Subj: Information?
▷From: chris@aol.com
 To:   mark@topproduc
Date: 09/22/03
Hi,
Please send me some info
More               Back
```

You can view messages from the Inbox or from other email folders. The following view-only information is displayed:

- **Subj:** — the email subject.
- **From:** — the email sender.
- **Date:** — the date the email was received. A paperclip or (**A**) next to this field indicates that the email contains an attachment.

You can select:

- **To:** — the email recipients. Move the cursor over this item and select it to view a list of all primary recipients.
- **Cc:** — the email carbon-copy recipients. Move the cursor over this item and select it to view a list of all **Cc:** recipients. (The **Cc:** field will only appear if the sender has specified one or more carbon-copy recipients.)

Note: You cannot view attachments in Top Producer SellPhone.
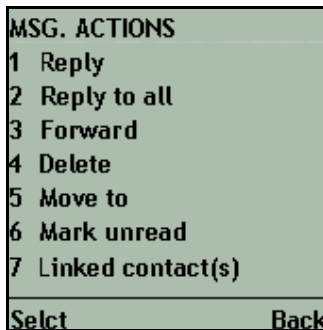

The email message is displayed below the date. Use the scroll keys to scroll down and read the entire message.

- **More** — reply to the message, forward it, delete it, move it to a folder, or view linked contacts. For more information, see *"Message menu" on page 80*.

Message menu

Main menu
Email
Inbox
View message
Message menu

MSG. ACTIONS
1 Reply
2 Reply to all
3 Forward
4 Delete
5 Move to
6 Mark unread
7 Linked contact(s)

Selct   **Back**

From the *Message menu* you can select:

- **Reply** — reply to the message. For more information, *"Composing a message" on page 82*.
- **Reply to all** — reply to all message recipients. For more information, see *"Composing a message" on page 82*.
- **Forward** — forward the message. For more information, see *"Composing a message" on page 82*.
- **Delete** — delete the message. Depending on how you have set Top Producer SellPhone's delete confirmation preference (for more information, see *"Show 'Delete' confirmation" on page 98*), you may be asked to confirm message deletion. Deleted messages are moved to the *Trash* folder. For more information, see *"Trash" on page 88*.
- **Move to** — move the message to another folder. For more information, see *"Move to" on page 80*.
- **Mark unread** — mark the message unread. When you mark an email unread, the email list screen you were previously viewing will appear, displaying the email message as unread.
- **Linked contact(s)** — view contacts linked to the message. For more information, see *"Linked contacts" on page 81*.

Main menu
Email
Inbox
View message
Message menu
Move to

MOVE TO
1 ▶ Sent Items(1t)
2 Trash(2t)
3 Immediate(1t)
4 Wait(0t)
5 Personal(1t)

Selct   **Back**
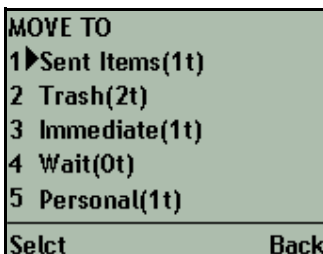
Move to

Select a folder to move the message to it.

> **Note:** You cannot move messages in or out of the **Drafts** folder. However, you can delete messages from the **Drafts** folder.

Linked contacts

Main menu
Email
Inbox
View message
Message menu
Linked contacts

```
LINKED CONTACTS
1▶Create Link
2  Bay, James
3  Berkley, Alice


Selct              Back
```

You can manually link a contact to an email using **Create Link**. When you do this, the email will show up in the contacts history and you will have a record of correspondence with the contact.

Use the *Linked contacts* screen to view contacts that have been linked to an email. You can link an email to one or multiple contacts.
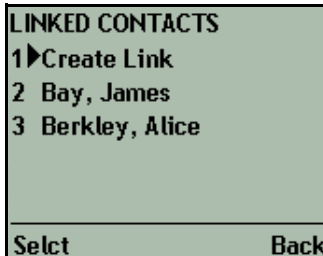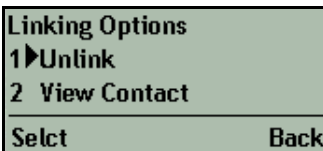
- **Create Link** — link the email to a contact. For more information, see *"Link To contact" on page 81*.
- Select a contact from the list of linked contacts to unlink or view the contact. For more information, see *"Linking options" on page 81*.

Linking options

Main menu
Email
Inbox
View message
Message menu
Linked contacts
Linking options

```
Linking Options
1▶Unlink
2  View Contact
Selct              Back
```

- **Unlink** — remove the link to a contact.
- **View Contact** — view the linked contact. For more information, see *"Contact details" on page 35*.

Link To contact

Main menu
Email
Inbox
View message
Message menu
Linked contacts
Create link

```
LINK TO
1▶Search
2  List All
Selct              Back
```
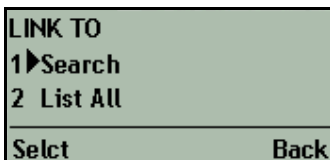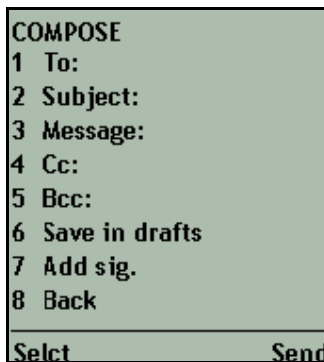
- **Search** — search for a contact. Select the contact from the search results screen to link it to the email. For more information, see *"Quick search" on page 32*.
- **List All** — list all your contacts. Select a contact from the list to link it to the email.

Sending An Email Message

Composing a message

```
COMPOSE
1 To:
2 Subject:
3 Message:
4 Cc:
5 Bcc:
6 Save in drafts
7 Add sig.
8 Back

Selct          Send
```

To send an email, you must enter information in the **To:** field. The other fields are optional.

- **To:** — enter/edit recipients for the email. If there is more than one recipient, the number of recipients is displayed. For more information, see *"To, Cc and Bcc" on page 83*.

- **Subject:** — enter or edit a subject for the email. For more information, see *"Subject" on page 85*. If a subject already exists, you can edit it or add it to the quick subject list. For more information, see *"Edit subject:" on page 85*.

- **Message:** — enter/edit the body of the email. For more information, see *"Message" on page 86*.

- **Cc:** — select or add a carbon-copy recipient. For more information, see *"To, Cc and Bcc" on page 83*.

- **Bcc:** — select or add a blind carbon-copy recipient. For more information, see *"To, Cc and Bcc" on page 83*.

- **Save in drafts:** — save the email in the *Drafts* folder. You can save an incomplete email, then finish and send the email at a later time.

- **Original msg:** — view the original message. This option is only available if you are replying to or forwarding a message.

- **Add sig.** — select **Add. sig** to append a signature to your message. This option will not appear if you have not created a signature in Top Producer 7i.

> **Note:** You can specify email signature settings in the **Signature** section of Top Producer 7i's *Agent information* window. In Top Producer 7i, point to **Setup**, then click **Agent setup**.
>
> Because Top Producer SellPhone sends all email in plain text, any formatting applied to your signature in Top Producer 7i will be removed when the email is sent.
>
> If you are using a large signature, inserting it into the message may result in a message that is too large to edit on the phone. For more information, see *"Email Size Limit" on page 78*.

- **Back** — return to the *Email menu*. For more information, see *"The Email Menu" on page 78*. If you have unsaved changes to the email, you will be prompted to save the message in the **Drafts** folder. For more information, see *"Drafts" on page 88*.

- **Send** — send the email. You will receive a confirmation that your message has been sent. Top Producer SellPhone sends email in plain text, so any formatting in your Top Producer 7i signature will be removed.

Note: You can elect to NOT receive confirmations. For more information, see *"Show 'Success' screens" on page 98*.

To, Cc and Bcc

You can enter the email address manually, or select a contact which contains an email address.

Main menu
Email
Compose message
To

```
To:
1▶Enter addr.
2  Ins. contact

Selct            Back
```

- **Enter addr.** — enter one or more email addresses manually. If you want to send the email to more than one person, separate the addresses with a semi-colon or space. For more information about using special symbols, see *"How to enter text" on page 20*.

- **Ins. contact** — select a contact to send the email to. For more information, see *"Insert contact" on page 83*.

```
To:johnsmith@site.net
1▶Add
2  Edit
3  Ins. contact

Selct            Back
```

If you have already entered one or more recipients for the email, you will have some other options:

- **Add** — add another recipient.

- **View or edit** — view or edit the recipients' email addresses. For more information, see *"Editing or removing recipients" on page 84*.

- **Remove** — remove a recipient's email address from the email. This option is only displayed if you have one recipient listed in the **To**, **Cc**, or **Bcc** fields.

Insert contact

Main menu
Email
Compose message
To
Insert contact

```
To:
1▶Search
2  List all

Selct            Back
```

You can search for a contact or select from a list.

- **Search** — search for a contact by name or contact type. Only contacts with at least one email address will be displayed. For more information, see *"Insert contact search" on page 84*.

- **List all** — list all contacts with at least one email address.

Insert contact search

You can search by name or contact type.

```
SEARCH:
1▶Name:
2 Cont. type:

Selct              Find
```

- **Name:** — enter a first or last name, then select the **Find** Soft key to search for the name. Select a contact from the resulting list to enter their email address into the recipient list. For more information, see *"Alternate address"* below.

- **Cont. type:** — enter a contact type to search for, then select the **Find** Soft key to search for contacts with that type. Select a contact from the resulting list to enter their email address into the recipient list. For more information, see *"Alternate address"* below.

> **Note:** Apply **Select all** to the results of the search to send an email to all contacts with a particular type.

Alternate address

```
To:
1▶jbay@site.net
2 jbay@hootmail.com
3 jbay@yooha.com

Selct              Back
```

By default, the contact's primary email address is used when inserting an email address (see *page 105*). If you de-select this Top Producer SellPhone preferences option, when a contact has more than one email address you will be prompted to pick which address to use. Select the appropriate address to be placed into the recipient field.

Editing or removing recipients

```
To:
1▶jbay@site.net
2 jbay@other.com
3 jbay@site.com




Selct              Back
```

```
To:jbay@site.net
1▶Edit
2 Remove


Selct              Back
```

To edit or remove a recipient, select them from the recipient list (this step is bypassed if there is only one recipient), then select:

- **Edit** — edit the recipient's email address.
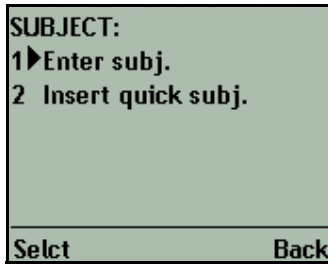- **Remove** — remove the contact from the recipient list.

Subject

```
SUBJECT:
1▶Enter subj.
2  Insert quick subj.



Selct              Back
```

You have the option of entering your own subject or you can pick a *quick subject* from the list.

- **Enter subj.** — enter a subject manually. When you have entered the subject, select **OK**.
- **Insert quick subj.** — select a pre-written subject from the list to use a "quick subject".

> **Note:** You can add the subject to the quick subject list (see *"To add a subject to the quick subject list:" on page 85*). For more information about quick subjects, see *"Quick Subjects" on page 91*.

Edit subject:

```
SUBJECT: Activity
1▶Edit
2  Insert quick subj.
3  Add to quick subj.
Selct              Back
```

If you have already entered a subject, you will have three additional options:
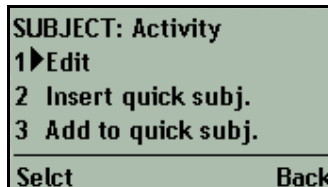
- **Edit** — edit the subject.
- **Insert quick subj.** — insert a new quick subject. Select a subject from the quick subject list, such as **Call me**, **Appointment**, etc.

> **Note:** When you insert a new quick subject, any existing subject text will be overwritten.

- **Add to quick subj.** — add the current subject to the quick subject list.

**To add a subject to the quick subject list:**

1. From the *Subject* screen, select **Enter subject** and enter a subject.

2. Select the new **Subject** again from the *Compose message* screen.

   The *Edit subject* screen opens.

3. Select **Add to quick subj.** to add the subject to the quick subject list.

Message

Main menu
Email
Compose message
Message

```
MESSAGE:
1▶Enter msg.
2  Insert quick msg.



Selct              Back
```
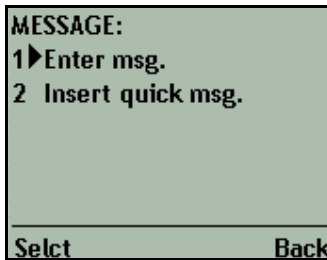
You have the option of entering your own message or you can pick a *quick message* from the list.

- **Enter msg.** — enter a message manually. When you have entered the message, select **OK**.
- **Insert quick msg.** — select a pre-written message from the list to use a *"quick message"*.

> **Note:** You can add your message to the *quick message* list (see *"To add a message to the quick message list:" on page 86*). For more information about quick messages, see *"Quick Messages" on page 90*.

Edit message

Main menu
Email
Compose message
Message
Edit message

```
MESSAGE: FYI
1▶Edit
2  Insert quick msg.
3  Add to quick msg.


Selct              Back
```
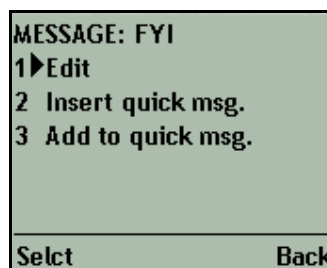
If you have already entered a message, you will have three additional options:

- **Edit** — edit the message.
- **Insert quick msg.** — insert a new *quick message*. Select a message from the *quick message* list to insert it.
- **Add to quick msg.** — add the current message to the *quick message* list.

To add a message to the quick message list:

1. From the *Message* screen, select **Enter message** and enter a message.

2. Select the new **Message** again from the *Compose message* screen.

   The *Edit message* screen appears.

3. Select **Add to quick msg.** to add the message to the *quick message* list.

Working With Folders

There are four default folders: **Inbox**, **Drafts**, **Sent items** and **Trash**.

- **Inbox:** this folder contains new email.
- **Drafts:** this folder contains email messages that you have selected to save in the drafts folder.
- **Sent items:** this folder contains email that has been sent, but only if you have selected the **Save sent emails in the sent items folder** check box on the *Email preferences* page of Top Producer 7i. For more information, see the Top Producer 7i User Guide.

> **Note:** Email sent using Top Producer 7i's mass email feature does not appear in the **Sent items** folder.

- **Trash:** this folder contains deleted messages.

It is a good idea to create your own custom folders and move relevant email messages into them when you receive them. For example, you may wish to create an **Action** folder and move email that requires immediate attention into it.
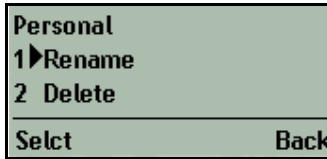
Folders

Main menu
Email
Folders

```
FOLDERS
1 New
2 Inbox(3t)
3 Sent Items(1t)
4 Drafts(1t)
5 Trash(2t)
6 Immediate(1t)
7 Wait(0t)
8 Personal(1t)

Selct          Back
```

Each folder name displays the number of unread (**u**) messages and the total (**t**) number of messages.

- **New** — create a new folder. Enter the new folder name and select **OK**. The new folder will appear in the **Folders** list.

> **Note:** If you try to create a folder with the same name as a system folder (such as **Trash**, **Outbox**, **Inbox**, etc.), Top Producer SellPhone will ignore the request.

- **Inbox** — view the **Inbox** folder. For more information, see *"Inbox" on page 79*.
- **Sent items** — view the **Sent Items** folder.
- **Drafts** — view the **Drafts** folder. For more information, see *"Drafts" on page 88*.

- **Trash** — view the **Trash** folder. For more information, see *"Trash" on page 88*.

- You can also select any folders you have created. The example to the left displays the user-created folders **Immediate**, **Wait** and **Personal**.

Folder menu

Main menu
Email
Folders
Select custom folder
Menu

```
Personal
1▶Rename
2 Delete

Selct          Back
```

Select a custom folder, then select the **More** Soft key to display the **Folder** menu. This screen allows you to rename or delete custom folders.

> **Note:** You cannot rename or delete the four default folders, so there is no **More** option in these folders.

- **Rename** — rename the folder. Enter the new folder name and select **OK**.

- **Delete** — delete the folder and all contents. You will be asked to confirm folder deletion.

Trash

Main menu
Email
Folders
Trash

```
TRASH(2u/5t)
1 Empty Trash
2 *Hello again 09/20/01
3 *For your info 09/20/01
4 Reminder 09/20/01
5 Hello! 09/19/01

Selct          Back
```
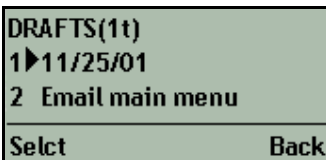
The **Trash** folder contains deleted email.

- **Empty trash** — permanently delete all messages in the **Trash** folder.

To read a message or move it to another folder, select it.
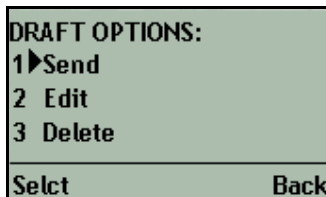
Drafts

Main menu
Email
Folders
Drafts

```
DRAFTS(1t)
1▶11/25/01
2 Email main menu

Selct          Back
```

The *Drafts* folder contains email that has been written and saved using the **Save in drafts** function (see *"Composing a message" on page 82*.)

- Select a message to send, edit, or delete it. For more information, see *"Draft options"* below.

Draft options

Main menu
Email
Folders
Drafts
Select message

```
DRAFT OPTIONS:
1▶Send
2 Edit
3 Delete

Selct          Back
```

- **Send** — send the message. It will disappear from the **Drafts** folder and a copy will be placed in the **Sent items** folder.

- **Edit** — edit the message. For more information, see *"Composing a message" on page 82*.

> **Note:** If the email draft was originally created using Top Producer 7i, you will not be able to edit the message from your phone. You must use Top Producer 7i to make modifications. The same is true for email drafts created using Top Producer SellPhone and edited using Top Producer 7i. If, however, you originally created the email draft using Top Producer SellPhone, and no edits have been made in Top Producer 7i, you may edit the message as usual.
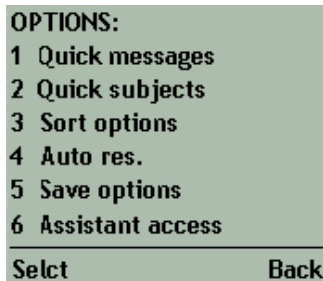
- **Delete** — delete the message. The message will be moved to the **Trash** folder. For more information, see *"Trash" on page 88*.

Email Options

Use *Email options* to configure your email preferences. These include **Quick Messages** and **Quick Subjects**, how email is sorted in lists, auto-responses to email when you are away, and whether message deletion requires confirmation.
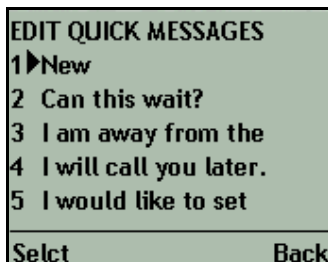
Options

Main menu
Email
Options

```
OPTIONS:
1  Quick messages
2  Quick subjects
3  Sort options
4  Auto res.
5  Save options
6  Assistant access

Selct              Back
```

- **Quick msgs.** — edit or add quick messages. For more information, see *"Quick Messages" on page 90*.
- **Quick subjs.** — edit or add quick subjects. For more information, see *"Quick Subjects" on page 91*.
- **Sort options** — define how email lists are sorted. For more information, see *"Sort options" on page 91*.
- **Auto res.** — set auto-responder options. For more information, see *"Auto-responder" on page 92*.
- **Save options** — set message save options. For more information, see *"Save options" on page 93*.
- **Assistant access** — allow or disallow assistants to access your email. For more information, see *"Assistant access" on page 93*.

> **Note:** You can add, edit or delete quick subjects and quick messages in Top Producer 7i's *SellPhone preferences* window. Point to **Setup**, then **Applications setup**, and then click **Top Producer SellPhone**. For more information, see *"Click the Quick Subjects and Quick Messages drop-down list and select:" on page 105*.
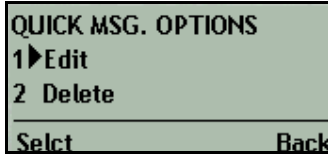
Quick Messages

Main menu
Email
Options
Quick Msgs.

```
EDIT QUICK MESSAGES
1 ▶New
2  Can this wait?
3  I am away from the
4  I will call you later.
5  I would like to set

Selct              Back
```

Quick Messages are short (up to 256 characters) messages that you can quickly insert into the body of an email, eliminating the need to type the whole message.

- **New** — enter a new quick message. After entering the message select **Save**.
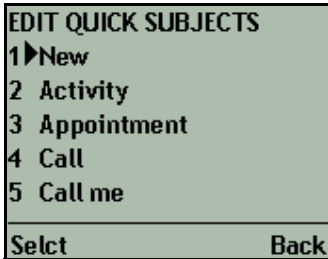- Select a quick message to edit or delete it. For more information, see *"Quick Message options"* below.

Quick Message options

```
QUICK MSG. OPTIONS
1▶Edit
2 Delete

Selct          Back
```

- **Edit** — edit the quick message. After editing the message, select **Save**.
- **Delete** — delete the quick message.

Quick Subjects

```
EDIT QUICK SUBJECTS
1▶New
2 Activity
3 Appointment
4 Call
5 Call me

Selct          Back
```

Quick subjects are short (up to 256 characters) subjects that you can quickly insert into the subject line of an email, eliminating the need to type the entire subject.

- **New** — enter a new quick subject. After entering the subject select **Save**.
- Select a quick subject to edit or delete it. For more information, see *"Quick Subject options"* below.
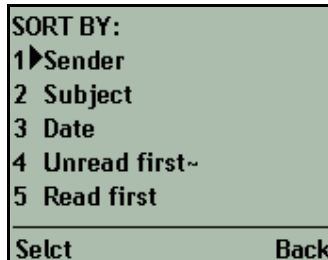
Quick Subject options

```
QCK SUBJ. OPTIONS
1▶Edit
2 Delete

Selct          Back
```
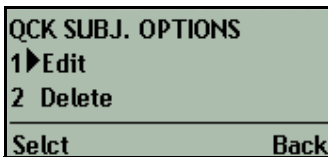
- **Edit** — edit the quick subject. After editing the subject, select **Save**.
- **Delete** — delete the quick subject.

Sort options

```
SORT BY:
1▶Sender
2 Subject
3 Date
4 Unread first~
5 Read first

Selct          Back
```

You can choose how your email messages are sorted, and whether they are sorted in ascending or descending order. A tilde sign (**~**) indicates under which criteria email are sorted, while an **<A>** or **<D>** indicates the sort direction (ascending or descending).

- **Sender** — sort email by sender.
- **Subject** — sort email by subject.
- **Date** — sort email by date.
- **Unread first** (default) — display unread email first, sorting by date.
- **Read first** — display read email first, sorting by date.

Ascending/descending order

```
Sort by Sender in:
1▶Ascending order~
2 Descending order

Selct          Back
```
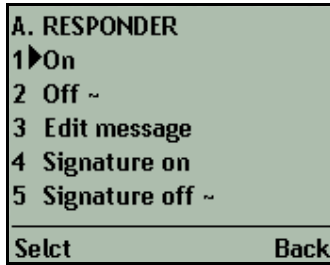
When sorting by sender, subject or date, you must choose whether to sort in ascending or descending order.
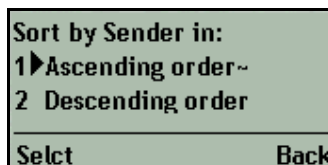
- **Ascending order** — sort the selected criterion in ascending order.
- **Descending order** — sort the selected criterion in descending order.

Auto-responder

```
A. RESPONDER
1▶On
2  Off ~
3  Edit message
4  Signature on
5  Signature off ~

Selct              Back
```

> **Note:** This option is NOT available if you have set up a POP3 email account in Top Producer 7i. You must have an @topproducer.com email address to use the auto-responder.
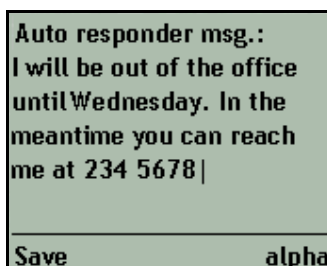
The auto-responder will reply to messages when you are away. You can use this feature in two different ways:

1. When you will be away for an extended period, set up a message such as *"I am currently away from the office. In the meantime you can reach me at (phone number)"*, or *"I am currently away from the office. I will contact you when I return on (date)"*.

2. If you want to reply to all messages so that the contact knows you have received their message, set up a message such as "I have received your message and will be contacting you shortly".

   - **On** — turn on the auto responder.
   - **Off** — turn off the auto responder.
   - **Edit message** — edit the auto-responder message.
   - **Signature on** — include signature in auto-responder message.
   - **Signature off** — leave signature out of auto-responder message.

> **Note:** The auto-responder will not send more than one out-of-office response to the same email address in any 24-hour period. This is to prevent an endless loop between two auto-responders from occurring.

Edit auto-responder message

```
Auto responder msg.:
I will be out of the office
until Wednesday. In the
meantime you can reach
me at 234 5678|




Save              alpha
```

- Enter or edit the auto-responder message. When finished, select **Save**.

Save options

Save sent messages in sen
1▶On~
2 Off

Selct   Back

You can have sent messages automatically saved in the **Sent** folder. The current setting is marked with a tilde sign (~).

- **On** (default) — save sent messages in the **Sent** folder.
- **Off** — do not save sent messages in the **Sent** folder.

Assistant access

Allow assistants access to
1▶On
2 Off~

Selct   Back

You can allow your assistants to access your email through the My email function in Top Producer 7i. The current setting is marked with a tilde sign (~).

- **On** — assistants can access your email via Top Producer 7i.
- **Off** (default) — assistants cannot access your email.

> **Note:** When the assistant access is turned "On", your assistant can only access your email through the My email function in Top Producer 7i, <u>NOT</u> via the Email function in Top Producer Sell-Phone.

SellPhone Preferences

In this chapter:

Customizing Top Producer SellPhone Preferences

You can customize the way you log into Top Producer SellPhone, which screen is displayed when you log in, and how contacts, activities, listings and closings are displayed on your phone. To do this you must first log into Top Producer 7i.

> **Note:** You must have a Top Producer SellPhone license to access the *SellPhone preferences* page in Top Producer 7i.

To access Top Producer SellPhone preference settings:

1. Using a web browser, (i.e. Internet Explorer) go to https://www.topproduceronline.com and log in to Top Producer 7i using your username and password.

2. From the main menu, point to **Setup**, **Applications setup**, and then click **Top Producer SellPhone**.

   The *SellPhone preferences* page opens.

The page is divided into two parts, the **Application settings** section at the top (see *"Application settings" on page 96*); and a series of tabs in the bottom of the page (see *"Using the SellPhone Preference page tabs" on page 98*).

3. Customize your settings using this page as described later in this section.

4. If you want to revert the preference settings back to their initial default values, click **Restore all defaults** from the action menu.

5. Once you have finished changing your settings, select **OK** to save.

Application settings

The **Application settings** section of the *SellPhone preferences* page lets you customize Top Producer SellPhone on your mobile phone. You can specify which screen opens first, how you log in, and which most frequently used phone number you want displayed for your contacts. In addition, you can decide if you want confirmation messages displayed when you successfully perform a function.

Startup screen

```
Startup screen
Main menu                              ▼
```

You can choose which screen will display immediately after logging into Top Producer SellPhone.

Click the drop down-list and choose from:

- **Main menu** — This is the default screen. For more information, see *"The Main Menu Options" on page 24*.
- **Quick search** — For more information, see *"The Contact Management Screens" on page 32*.
- **Today's business** — For more information, see *"Today's Business Screens" on page 49*.
- **Listings** — For more information, see *"The Listings Screens" on page 65*.
- **Closings** — For more information, see *"The Closings Screens" on page 71*.
- **Leads** — For more information, see *"The Leads Screens" on page 57*.
- **Email** (if email has been setup). For more information, see *"The Email Menu" on page 78*.

- **Contact search** — For more information, see *"Contact Search" on page 33*.

Authentication rule

Authentication rule
Require password only ▼
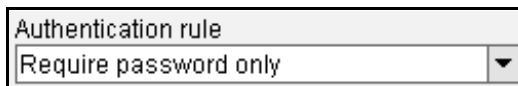
This setting allows you to choose how you log into Top Producer SellPhone. You must also log into Top Producer SellPhone at least once using both username and password before these rules come into effect.

Depending on your cellular provider the **Require password only** and **No username and password** options may not be available. In this case, regardless of your **Authentication rule** setting, you will always be required to enter your username and password to log on to Top Producer SellPhone.

- **Require username and password** — You must enter your username and password every time you log into Top Producer SellPhone. This setting provides maximum security.
- **Require password only** (default) — Your username is automatically retrieved when you log in, and you need only enter your password. This setting provides good security with more convenience.
- **PIN code only** — You must enter your PIN code number each time you log on. This setting provides good security with more convenience.
- **No username or password** — Your username and password are automatically retrieved whenever you log in. This setting provides less security but is most convenient.

Phone type priority for auto-dialing

Phone type priority for auto-dialing
Business
Fax
Home
Mobile
Other
Pager
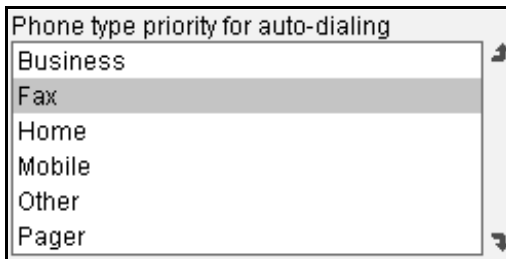
When you view or dial a contact's phone number, the phone number used will correspond to the **Show in list** setting of the Top Producer 7i contact record. Please see the Top Producer 7i online Help for more information.

If there is no phone number of this type in the record, the type of phone number displayed will be determined by the **Phone type priority for auto-dialing** list. This setting also determines the default phone number type when a new number is created.

Re-arrange the priority order by selecting a phone number type and clicking the **Up** or **Down** arrows.
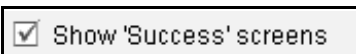
Show 'Delete' confirmation

☑ Show 'Delete' confirmation
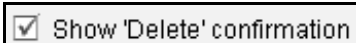
By default, you must confirm deletion of contacts, email addresses, notes, phone numbers, activities, leads, listings or closings. De-select this option if you do not want to have to confirm deletion of these items.

Show 'Success' screens

☑ Show 'Success' screens

By default the completion of certain email operations (for example sending an email) are marked by a 'success' screen. De-select this option if you do not want to have these operations confirmed.

Using the SellPhone Preference page tabs

The *SellPhone preferences* page in Top Producer 7i has a series of seven tabs you can use to customize different areas of Top Producer SellPhone. The tabs are:

- **Lead Alerts** — see *page 98*.
- **Phone numbers** — see *page 99*.
- **Contacts** — see *page 100*.
- **Activities** — see *page 102*.
- **Display in lists & Week view** — see *page 103*.
- **Email** — see *page 104*.
- **Listings & Closings** — see *page 106*.

Enabling Lead Alerts

Short Message Service (SMS) lets you receive short text messages from a mobile phone. If you have an SMS-capable mobile phone, Top Producer SellPhone can alert you when a lead is received in Top Producer 7i.

Please contact your cellular service provider to:

- ensure that your phone can support SMS.
- activate SMS on your service, if necessary.
- obtain the email address used to send messages to your phone.
- ask for instructions on how to receive SMS messages on your phone.

To enable lead alerts:

1. From the *SellPhone preferences* page, click the **Lead Alerts** tab.

2. Select the **Enable Lead Alerts** check box to use this feature.

3. Enter your cell phone's three-digit area code in the **Area code** field.

4. Enter your cell phone's seven digit phone number in the **Number** field.

5. Click the arrow next to the **Wireless service provider** drop-down list box and select your wireless provider from the list. If your wireless provider is not listed, select **Other** from the list.

   - If you select **Other**, the **Email address for notification** field appears.
   - Enter the email address used to send messages to your phone.

6. To send a test message to your phone, click the **Send test message** link and ensure your phone is turned on. A test message is sent to your phone, reading *"Test message from Top Producer SellPhone"*.

Phone numbers

These settings determine how phone numbers are dialed. You should adjust these settings according to your telephone company's local area code system.

To set up how phone numbers are dialed:

1. From the *SellPhone preferences* page, click the **Phone numbers** tab:

| Lead Alerts | Phone numbers | Contacts | Activities | Display in lists & Week view |

○ As stored in the database

◉ Using local area codes

Do not dial 1 for area codes: | 905,906

Do not dial area codes: | 604

2. Select one of the following options:

- **As stored in the database** — numbers will be dialed exactly as they are described in the database.
- **Using local area codes** — enter local area codes and codes that do not require dialing. If you select this option two more options become available:
  - **Do not dial 1 for area codes**: enter a list of local area codes that require dialing but are not long distance, separated by commas.
  - **Do not dial these area codes**: enter a list of area codes, separated by commas, that do not require the code to be dialed.

Contacts

Contacts settings determine how contacts are displayed in lists and on the *Details* screens. The default value for the number of contacts displayed in a list is 40 items, however, you can go as high as 999.

To specify how contacts are displayed in lists:

1. From the *SellPhone preferences* page, click the **Contacts** tab:

| Lead Alerts | Phone numbers | Contacts | Activities | Display in lists & Week view | Email | Listings & Closings |

Sort order

◉ Ascending   ○ Descending

☑ Show long list warning for | 40 | or more contacts

2. Under **Sort order**, select one of the option buttons to specify how you want lists to be sorted:

- **Ascending** — select this option button to sort lists from top to bottom. This is the default setting.
- **Descending** — select this option button to sort lists from bottom to top.

3. Select the **Show long list warning for [x] or more contacts** check box and enter a value in the adjacent text box to enable Top Producer SellPhone to display a warning whenever a contact search returns a list of contacts greater than or equal to the set number. By default, this option is <u>NOT</u> selected.

Activities

The **Activities** settings determine the way your phone displays Today's business items.

To specify how activities are displayed in Today's business:

1. From the *SellPhone preferences* page, click the **Activities** tab:

Lead Alerts	Phone numbers	Contacts	Activities	Display in lists & Week view	Email	Listings & Closings

Default type	Default priority	Change to repeating activity
Appointment	1	Applied to modified activity
Week starts on	**Default duration**	**Default follow-up type**
Sunday	15 min	Call

2. Click the **Default type** drop-down list to specify which activity type you want assigned to a new activity automatically:

  - **Appointment** (this is the default setting)
  - **Call**
  - **To-do**

3. Enter a value from 1 to 99 in the **Default priority** text box to specify the default priority assigned to activities.

4. Click the **Change to repeating activity** drop-down list and specify how you want your edits applied to a selected repeating activity. You can have the changes apply only to the edited activity, to all occurrences of the repeating activity, or you can choose at the time you edit the activity.

  - **Require confirmation** — changes will be applied only to the edited activity or to all occurrences of the activity.
  - **Applied to all activities** — changes will be automatically applied to all occurrences of the repeating activity.
  - **Applied to modified activities** — changes will be applied only to the edited activity (this is the default setting).

Note: If you apply a change to a single repeating activity, such as the description, the activity will become unlinked from the group, becoming an independent activity. This does <u>NOT</u>

occur if you change only the date of the single activity.

5. Click the **Week starts on** drop-down list and specify the day that Today's business **Week view** starts with:

- **Sunday** (this is the default setting)
- **Monday**

For more information, see *"The Week view" on page 53*.

6. Click the **Default duration** drop-down list and specify the default duration for a new activity:

- **15 min** (this is the default setting)
- **30 min**
- **45 min**
- **1 hour**
- **1 hour 15 min**
- **1 hour 30 min**

7. Click the **Default follow-up type** drop-down list and specify the type of activity that will be recorded in contact history when a lead is followed-up:
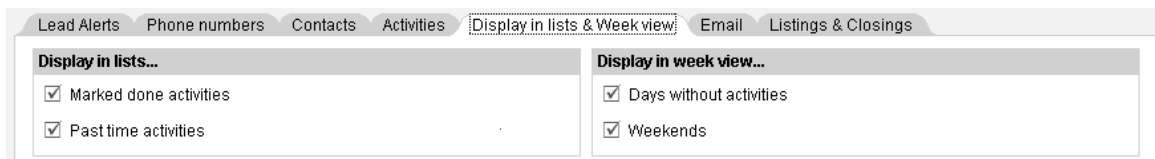
- **Call** (this is the default setting)
- **Appointment**
- **To-do**

Display in lists & Week view

You can specify whether you want marked done and/or past time activities displayed in lists in Top Producer SellPhone; and whether you want weekends and days with zero activities to be displayed in the **Week view**.

To specify how lists and Week view are displayed:

1. From the *SellPhone preferences* page, click the **Display in lists & Week view** tab:

Lead Alerts	Phone numbers	Contacts	Activities	Display in lists & Week view	Email	Listings & Closings

Display in lists...	Display in week view...
☑ Marked done activities	☑ Days without activities
☑ Past time activities	☑ Weekends

2. Under **Display in lists...**, select:

- **Marked done activities** — select this check box (☑) to display activities which are marked 'done' in the linked activity lists. If the box is cleared, or <u>NOT</u> selected, activities which are marked done are <u>NOT</u> displayed (this is the default setting).

> **Note:** Linked activity lists are those activity lists that can be viewed from within a contact, listing or closing record by selecting the **Activities** menu option.
> The Today's business activity list is <u>NOT</u> a linked activity list, so the **Display in lists** settings will <u>NOT</u> affect the display of information in that list.

- **Past time activities** — select this check box (☑) to display activities that are past their date in the linked activity lists (this is the default setting). If the box is cleared, these activities are <u>NOT</u> displayed.

3. Under **Display in week view…**, select:

- **Days without activities** — select this check box (☑) to display days without activities in the *Week view* screen (this is the default setting). The item appears with **[0]** appended to the day, indicating zero activities. If the box is cleared, the days without activities are <u>NOT</u> displayed.
- **Weekends** — select this check box (☑) to display **Saturday** and **Sunday** in the *Week view* screen (this is the default setting). If the box is cleared, **Saturday** and **Sunday** are <u>NOT</u> displayed.

Email

Use the **Email** tab to specify which contact email address you want to use for new contacts, modify email preferences, and to manage your list of preset Quick messages and Quick subjects. Quick Subjects and Quick Messages enable you to send and reply to email with a brief pre-written message or subject.

To specify your email settings:

1. From the *SellPhone preferences* page, click the **Email** tab:
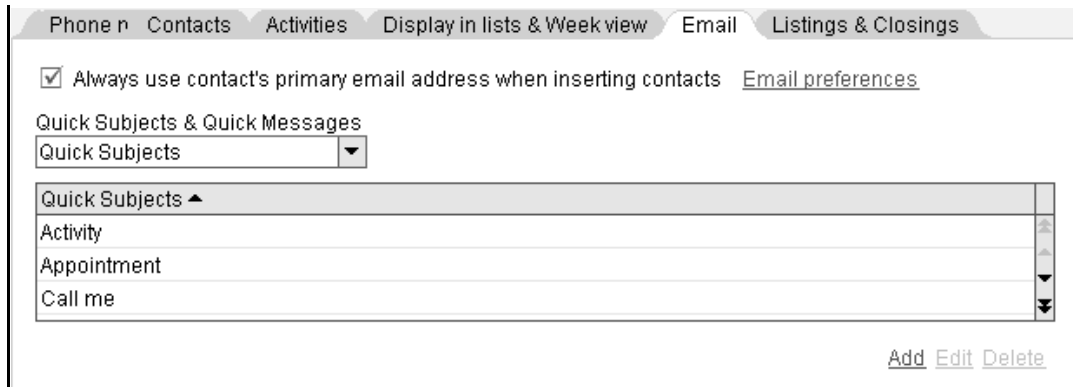
2. Select the **Always use contact's primary email address when inserting contacts** check box (☑) to specify that the contact's primary email address is always used when inserting a contact into the **To:**, **Cc:** or **Bcc:** fields of an email.

   • If you want to send email to a contact's secondary email addresses, clear the check box.

3. Click the **Email preferences** link to change your current email preferences. For more information about these email options, please see the Top Producer 7i User Guide or online Help.

4. Click the **Quick Subjects and Quick Messages** drop-down list and select:

   • **Quick Subjects** — to view the current list of pre-written quick subjects used to send/reply to email.
   • **Quick Messages** — to view the current list of pre-written short messages used to send/reply to email.
     • click the **Add** link to add new Quick Subject or Quick Message entries.
     • to change existing Quick Subject or Quick Message entries, highlight an item in the list and click the **Edit** link.
     • to remove an existing Quick Subject or Quick Message entry, highlight an item in the list and click the **Delete** link.

Listings & Closings

The **Listings & Closings** tab lets you specify the display format of listings; and sort order of listings and closings.

To specify the display format of listings and closings:

1. From the *SellPhone preferences* page, click the **Listings & Closings** tab:

> **Note:** The display format for closings is <u>NOT</u> editable, therefore, this setting remains unavailable.

2. Click the **Display format** drop-down list and select:

   - **Street address** — select this item to make reference to listings by their address (this is the default setting).
   - **Seller name** — select this item to make reference to listings by the seller name.

3. Under **Sort order**, select an option button(s) for **Listings** <u>AND</u> **Closings**:

   - **Ascending** — select this option button to sort listings/closings in ascending order (this is the default setting).
   - **Descending** — select this option button to sort listings/closings in descending order.

Troubleshooting

In this chapter:

Troubleshooting

Please read the following before contacting Top Producer Technical Support.

I cannot get to the Top Producer SellPhone login screen or Top Producer SellPhone stops working

(a) Make sure you are receiving digital cellular service

The wireless Internet requires digital cellular service to function. It is not uncommon for digital service to become unavailable in certain geographic locations, or if the cellular network is exceptionally busy. If you cannot log on to Top Producer SellPhone, first make sure that your cell phone is receiving digital service. Usually this is indicated by a "**D**" symbol in the phone's display. If you are receiving analog service (indicated by an "**A**" symbol), you will not be able to access the wireless Internet. Please try again later, or contact your cellular provider for assistance.

(b) Try to access a different Web site

Try to navigate to a Web site other than the Top Producer SellPhone login site. If you cannot get to any other web sites, please contact your cellular provider for assistance.

I cannot get back to the Main menu or log out of Top Producer SellPhone

Press the END key

Keep pressing the **END** key to go back to the *Main menu* or your micro browser's *GO TO* screen.