Top Producer 7i® Remote

Quick Setup

Top Producer 7i Remote Quick Setup

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What Is Top Producer 7i Remote?

Top Producer 7i Remote is a desktop version of Top Producer 7i. Top Producer 7i Remote only requires an Internet connection when you want to synchronize your data with Top Producer 7i, so you can work offline with your own data while using the same features of the Top Producer 7i online application.

You can synchronize your Top Producer 7i Remote data with Top Producer 7i, keeping your database up-to-date with the latest information that's been entered. However, before working with Top Producer 7i Remote, you need to install the software onto your desktop computer.

Top Producer 7i Remote System Requirements

- **Operating system:** Windows 2000 or Windows XP
- **Memory:** 256 megabytes (MB) of RAM
- **Free hard disk space:** 500 MB
- **Internet connection:** Broadband Cable or DSL
- **Supported Internet browsers:** Internet Explorer 5.5
- **Display:** Color palette: 16-bit color display or greater
- **Viewing resolution:** 1024 X 768 (recommended)

About This Guide

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

TOP PRODUCER 7i Remote Quick Setup:

- Provides you with information on how to access our other helpful references, including our online Help menu, the User Guide, and information on how to contact Technical Support for assistance.
- Tells you how to set up Top Producer 7i Remote, including how to install the program and download your Top Producer 7i data into Top Producer 7i Remote.

About Portable Document Format (PDF)

TOP PRODUCER 7i Remote Quick Setup is presented in Portable Document Format, and is viewed by using Adobe® Acrobat® Reader®.

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

Printing this user guide

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

   The *Print* pop-up window opens.

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

Saving this user guide to your hard drive

It is recommended to save TOP PRODUCER 7i Remote Quick Setup to any directory on your hard drive. To view the guide in the future, double-click the saved file to open it in Adobe Acrobat.

Note: If you save TOP PRODUCER 7i Remote Quick Setup to your hard drive, each time an

> update is made to the program, you will need to repeat these steps. This will ensure you have the latest version of the guide.

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

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

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

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

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

Searching for specific information

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

1. From the Adobe Acrobat toolbar, click the **Find** icon.

To search through this guide for specific information, click the **Find** icon.
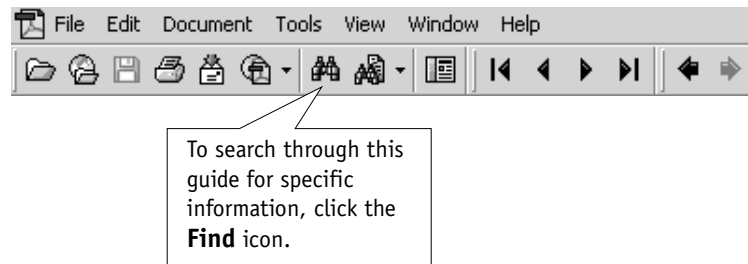
The *Find* pop-up window opens.
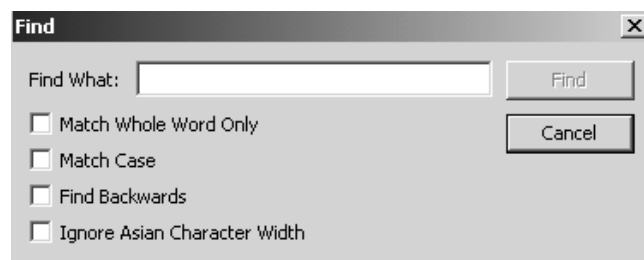
Another way to access the *Find* dialog box is to point to **Edit**, then click **Find.** You can also press **[Ctrl+F]**.

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

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

4. Click **Find**.

Navigating within this guide

If you are reading this guide online, click any text that appears in blue to automatically jump to the specified section. For example, if you see: For more information, see *"Installing Top Producer 7i Remote" on page 17*, click the text that appears in blue to automatically jump to the section.

Additional materials

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

The two ways to access the Top Producer 7i Remote User Guide are described below.

To access the guide from within Top Producer 7i Remote:

• From the main menu in TOP PRODUCER 7i Remote, point to **Help** and then click **User guide**.

  The Top Producer 7i Remote User Guide opens.

To access the guide from your Windows desktop:

• Click **Start**, **Programs**, **Top Producer 7i Remote**, then click **Top Producer 7i Remote User Guide**.

  The Top Producer 7i Remote User Guide opens.

How To Get The Most Out Of The Help

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

Accessing the Help

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

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

Finding a topic using Contents

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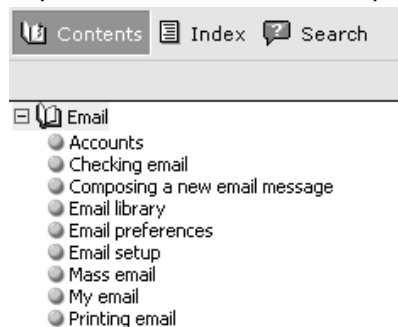
Finding a topic using the Index

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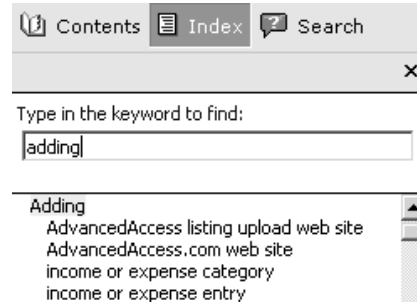
Searching for a topic

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

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

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

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

Printing a topic

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

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

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

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

Contacting Technical Support

Before contacting Technical Support, please see the Top Producer 7i Remote User Guide.

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

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

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

Setting Up Top Producer 7i Remote

In this chapter:

Setting Up Top Producer 7i Remote

Top Producer 7i Remote license details

Before you install, note the following points about your
Top Producer 7i Remote license:

- The computer that you install Top Producer 7i Remote on
  must be able to connect to the Internet. An Internet con-
  nection is required during installation, and each time you
  need to synchronize your data with Top Producer 7i.

- Each Top Producer 7i Remote license can be installed on
  one computer only.

- You cannot install more than one Top Producer 7i Remote
  license on the same computer. Therefore, if you have two
  or more Top Producer 7i Remote licenses, install each
  one on a different computer.

- Following the installation of Top Producer 7i Remote, all
  users who are part of the same Top Producer 7i account
  (agents, assistants, partners, etc.) will be able to log into
  and use Top Producer 7i Remote from the computer
  where it is installed.

- If you require Top Producer 7i Remote on more than one
  computer, you can purchase additional Top Producer 7i
  Remote licenses.

Setup overview

The following steps are required in order to set up Top Producer
7i Remote. Each step will be explained in more detail on the
pages that follow.

1. From the Agent setup section in Top Producer 7i,
   assign a Top Producer 7i Remote license to the
   agent (see *page 16*).

2. Download the installation file (see *page 16*).

3. Install Top Producer 7i Remote (see *page 17*).

4. Download your Top Producer 7i data into
   Top Producer 7i Remote (see *page 18*).

Assigning a Top Producer 7i Remote license

This section tells you how to assign a Top Producer 7i Remote license from Top Producer 7i.

1. From the main menu in Top Producer 7i, point to **Setup** and then click **Agent setup**.

   The *Agent information* page opens.

2. In the **Additional Top Producer applications** section, select the Top Producer 7i Remote check box.

   The displayed agent now has a Top Producer 7i Remote license.

Note: Although the agent has been assigned the Top Producer 7i Remote license, all users who are part of the same Top Producer 7i account will be able to log into Top Producer 7i Remote from the computer where it is currently being installed.

3. Click **OK**.

Downloading the installation file

This section tells you how to download the Top Producer 7i Remote installation file from Top Producer 7i.

1. Close all applications that are currently open.

2. Log into Top Producer 7i.

3. From the main menu in Top Producer 7i, point to **Setup**, **Applications setup** and then click **Top Producer 7i Remote**.

   The *Remote manager - user summary* page opens.

Note: Top Producer 7i can remain open for the duration of these instructions, but do not use the program features or access your data while Top Producer 7i Remote is being installed.

4. Click **Download Top Producer 7i Remote Software** from the action menu.

The *File Download* pop-up window opens.

5. Click **Open**.

The *Top Producer 7i Remote installation* wizard opens. Proceed to the next section.

Installing Top Producer 7i Remote

This section tells you how to install Top Producer 7i Remote onto your computer.

1. From the *Top Producer 7i Remote installation* wizard, click **Next** to begin the installation.

   The next step of the installation wizard opens, displaying the license agreement.

2. In order to proceed with the installation, you must read and accept the terms of the license agreement. Review the license agreement carefully. If you agree to its terms, select the **I accept the agreement** option and then click **Next**.

   Note: You won't be able to install Top Producer 7i Remote if you don't accept the license agreement.

3. Click **Next** to install Top Producer 7i Remote to the destination directory.

4. Click **Next** to accept the default file folder/program group (named **Top Producer 7i Remote**). This will allow you to later access Top Producer 7i Remote from the Windows **Start** menu.

   A message is displayed to inform you that the installation may take some time depending on the speed of your Internet connection and the number of program files required by your computer. The installation can range from a few minutes to one hour.

5. Click **Next** to begin the installation.

   During the installation, a progress bar appears showing you the progress of the installation.

   Note: During this step the necessary program files are downloaded from the Internet to your computer. Be sure to leave your Internet

> connection open. Do NOT attempt to switch to or run other programs during the installation.

6. Once the installation is complete, the *Top Producer 7i Remote installation* wizard opens, prompting you to restart your computer. Click **Finish** to restart your computer. Click **OK** if you are again prompted to restart your computer.

   Once your computer has restarted, the next step of the installation process appears, which is to download your Top Producer 7i data into Top Producer 7i Remote (see below).

Downloading your data into Top Producer 7i Remote

Before you begin working with Top Producer 7i Remote, you must download your Top Producer 7i data into Top Producer 7i Remote.

> **Note:** Ensure that your Internet connection remains open for the duration of this process.

1. Once the installation is complete and your computer has restarted, the first page of the data import wizard opens.

2. Enter your Top Producer 7i username and password in the appropriate fields, and then click **Continue**.

> **Note:** You must enter the username and password of the user that was assigned the Top Producer 7i Remote license. This is the license you assigned earlier in *"Assigning a Top Producer 7i Remote license" on page 16*.

3. A data request is sent. Your request may take some time to process, depending on how many requests are currently being handled. While your request is processing, Top Producer 7i Remote will automatically download the program files that are necessary to complete the import process.

4. If many users are sending data requests at the same time, the *Retrieving your data* page will appear, informing you of the remaining time it will

take to process your request.

If this page of the wizard appears, you have two options to choose from:

- The first option is recommended for most users. To automatically download your data once it's available, select the **Keep the program running in the system tray and automatically download the import file when the request is complete** option. A window will appear later informing you when your data is being downloaded. You can check the status of your request at any time by double-clicking the Top Producer 7i Remote icon in your system tray. The system tray is part of your taskbar and is usually located in the bottom right corner of your screen.

- The second option is recommended for modem or dial-up users. To receive a notification email that your data is ready for download, and to manually start the download process yourself, select the **Send me an email when my import file is complete. I will start the download manually** option. Type your email address in the adjacent field. You will receive an email notifying you that your data is available for download. Ensure your Internet connection is open, then begin the download process manually by double-clicking the Top Producer 7i Remote icon on your desktop.

5. Once you've been informed that your request has been processed, click **Continue** to begin downloading your data.

   A progress bar appears showing you the progress of the download. Once the download is complete, you will see the *Installing your data - Complete!* page.

6. Click **Continue** to log into Top Producer 7i Remote. You can now begin to use Top Producer 7i Remote. Please remember the following:

- **Synchronization reminder —** Remember that you must synchronize Top Producer 7i Remote a minimum of every 15 days, but it is recommended to synchronize every 2-3 days.

- **Login reminder —** Please note that all users of the Top Producer 7i account (agents, assistants, partners) can log into Top Producer 7i Remote from the computer where it is installed. If you need to install on more than one computer, you can then purchase additional Top Producer 7i Remote licenses.

Troubleshooting

In this chapter:

- *"Virus Scanners And Firewalls" on page 22*
- *"Repairing Top Producer 7i Remote" on page 23*

Virus Scanners And Firewalls

While Top Producer 7i Remote does not require an Internet connection for its day-to-day operation, there are periods during installation and data synchronization where the program must make contact with our servers via the Internet.

If your computer uses a firewall or virus scanner, you may see warnings during the installation or data synchronization that Top Producer 7i Remote is attempting to connect to the Internet or run scripts on your computer. It is important that you allow Top Producer 7i Remote to access the Internet at these times.

Unfortunately, due to the wide variety of firewalls and anti-virus programs that are currently available, it is not possible to provide you with specific steps. However, as a rule, if messages are generated by your firewall or anti-virus program during the installation or synchronization of Top Producer 7i Remote, offering you the choice to grant a file access to the Internet or deny it, make sure you grant access. Otherwise, the installation and/or data synchronization may fail.

In addition, most firewalls have a setting to remember your preference and act in the way that you choose. During the installation of Top Producer 7i Remote, if you see a dialog box asking if you want to grant a given program access to the Internet, look for an option similar to **Remember my answer and do not ask me again for this application**, or **Always allow access** (exact wording will vary depending on the firewall or anti-virus product). Choosing these options will reduce or eliminate the number of interruptions and ensure a proper installation of Top Producer 7i Remote.

If at any time during the installation of Top Producer 7i Remote you receive a message from your firewall or anti-virus program and you are not sure how to proceed, leave the message on screen and contact Top Producer Technical Support, by phone at 1-800-830-8300 or by email at support@topproducer.com.

Repairing Top Producer 7i Remote

You can run the repair utility if you receive an error while synchronizing your Top Producer 7i Remote database with Top Producer 7i.

1. From your Windows desktop, click **Start**, point to **Programs**, **Top Producer 7i Remote**, and then click **Repair Top Producer 7i Remote**.

   The *Repair Top Producer 7i Remote* wizard opens.

2. Ensure the **Repair Top Producer 7i Remote** option button is selected, then click **Next**.

   The *Repair Top Producer 7i Remote* dialog box opens, showing you the progress of the repair.

3. Retry the synchronization process. If the problem persists, contact Top Producer Technical Support.