Top Producer 7i®
User Guide

Top Producer Systems
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Trademarks

Document ID: 20060023.R2

System Requirements

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

Table Of Contents

Introduction

In this chapter:

What Is Top Producer 7i?

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

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

Top Producer 7i itself, and all your data, are safely stored on powerful servers, rather than on your local computer. Sophisticated backup and security systems ensure the safety of your data. In fact, the data security system currently includes an hourly system-wide data backup performed onsite, and an additional weekly system-wide data backup performed offsite. So the integrity and security of your data is guaranteed.

About This User Guide

This guide is saved in Portable Document Format (PDF). You can view it in the Adobe® Reader®.

For more information about Adobe Reader, please refer to Adobe Reader's online Help. To access the online Help, point to **Help**, then click **Reader Help**.

This guide was written to:

- help you start working effectively with Top Producer 7i in as little time as possible.
- provide you with an easy-to-use "How-to" reference.
- provide you with tips and explain program features and functionality.

You can print and download this user guide, as well as search for specific information.

Printing this user guide

This section tells you how to print this User Guide.

To print this guide:

1. From the Adobe Reader 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

Although you can access this user guide any time from Top Producer 7i by pointing to **Help**, then clicking **Download user guide**, you may want to save this guide to your hard drive if you're using a slower Internet connection. This lets you access the user guide more quickly.

To save this guide to your hard drive:

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

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

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

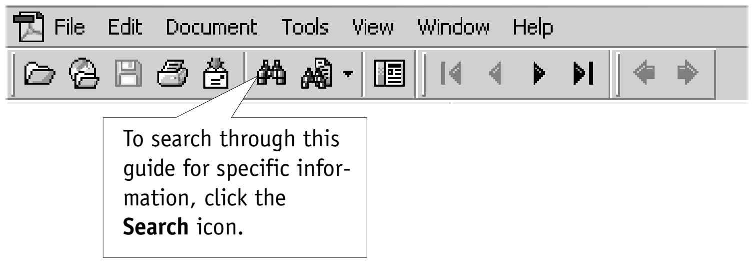
   Now you can quickly access this user guide from its saved location whenever necessary.

Searching for specific information

You can automatically locate specific information by searching for key words, such as “technical support”, “email”, or “listings”.

To search this guide for specific information:

1. From the Adobe Reader toolbar, click the **Search** 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 information about vendors, type “vendor”.

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 *“Working With The Scheduler” on page 249*, click the text that appears in blue (in this case, *“Working With The Scheduler” on page 249*) to automatically jump to the section.

About The Online Help

Top Producer 7i includes online Help. Use the online Help to quickly find out how to do something or to access this user guide in Adobe Acrobat (PDF) format. This section tells you how to access and use the online Help.

Please refer to the online Help **before** contacting Top Producer Technical Support, (see *"Contacting Technical Support" on page 18*).

To access the online Help:

1. Point to **Help**, and then click **Help topics**.

   The main online Help page opens.

2. In the main online Help page:

   - click the **Contents** tab to navigate to the topic you need help with.
   - click the **Index** tab, then type a key word, and then select from the topic list that appears.
   - click the **Search** tab, then type the topic you want help with, and then press **Enter**.

   View the help topic.

3. To print the topic, point to **File** and then click **Print**.

To print a specific online Help topic:

1. Click the mouse cursor anywhere in the displayed topic (located in the right pane).

   This ensures that the topic displayed will be the one you print.

2. Click the **Print** icon from the toolbar of your web browser; or point to **File**, then click **Print**.

Contacting Technical Support

Please refer to the online Help **before** contacting technical support. For more information about how to access the online Help, see *“About The Online Help” on page 17*.

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

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

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

Forgot or Want to Change Your Password?

If you forgot or want to change your password, you can create a new one. For security reasons, you will be required to enter some of your personal information and answer your secret password question.

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

To retrieve or change your password from the Login page:

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

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

3. Click **Next**.

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

4. Enter your **Secret answer**.

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

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

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6. Click **Finish**.

   The *Password changed successfully* message appears.

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

Learning The Basics

In this chapter:

Working With Top Producer 7i

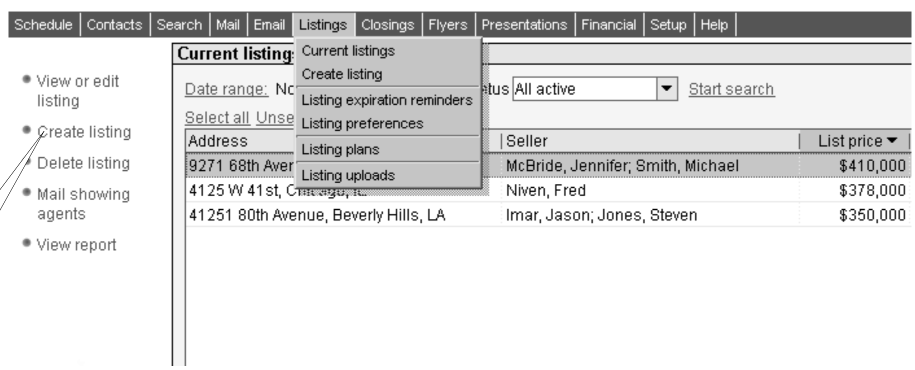
This section explains how to work with the elements on Top Producer 7i's pages (for example, menus and icons). You can click most page elements, letting you initiate commands, such as saving information or selecting items from a list.

All of the pages in Top Producer 7i have the same types of elements, such as a feature menu, feature submenus, and clickable icons.

Action Menu

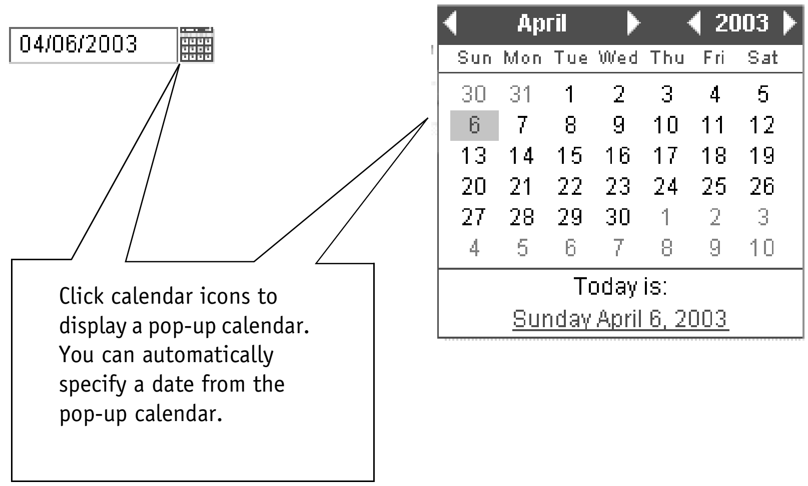
The action menu appears on the left side of most pages. Action menu items let you perform tasks, such as adding, editing, and deleting. Some action menu commands will appear disabled, indicating they are currently unavailable. After selecting a relevant item on the main page, the associated action menu items become available.

Action menus appear on the left side of most pages. Click an action menu item to initiate an action, such as printing or deleting.



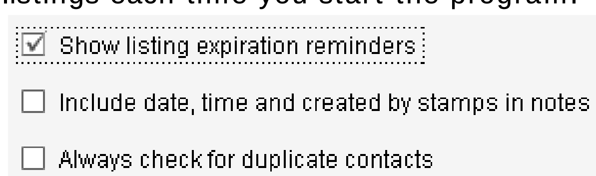
Calendar Icons

On some pages you will see a small calendar icon next to a date field. Click the calendar icon to display a pop-up calendar, then click a date on the calendar to automatically enter it into the field. Today's date is displayed at the bottom of the calendar, which when clicked, will automatically enter today's date in the date field. If you need to select a date outside the current month, click the arrows at the top to scroll forward and backward through the months.



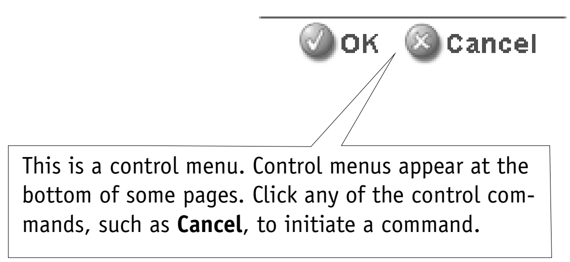
Check Boxes

Check boxes are used to select or deselect an option. Click the check box, or its label, to choose the option. A check mark appears in the check box. Click the check box again to clear the check mark to deselect the option. For example, click **Show listing expiration reminders** to be reminded about expired listings each time you start the program.



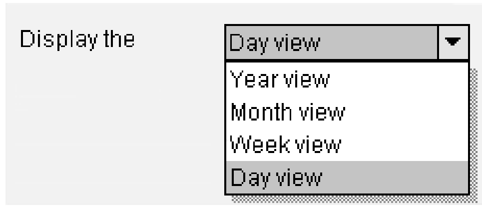
Control Menu

Control commands appear at the bottom of most pages. Examples of typical controls are **OK**, **Cancel**, **Enter next**, and **Close**. Use these commands to confirm and save changes, proceed to the next page, cancel an action, or close a page.



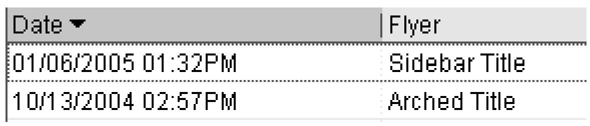
Drop-Down Lists

Drop-down lists show the currently selected item; or the first item in a list. Click the down arrow to display the full list of available items. Once you click an item from the list, it will be selected and displayed.



Headings

You can click most column headings to change the data's order of appearance on the page. A darker colored column heading with an arrow next to the heading name (shown in the **Date** column below) indicates that the data is being sorted by date. To sort by flyer name you would click the **Flyer** heading.

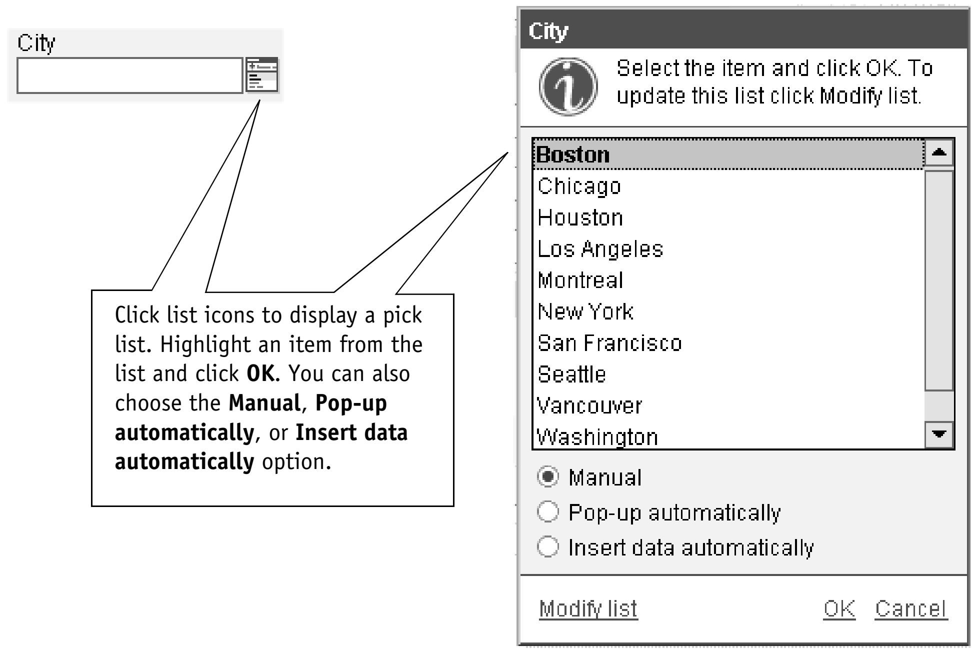


List Icons

List icons appear next to some text fields. Click the list icon to display a list of commonly used words or phrases (called a pick list). List icons make tasks such as entering new contacts quick and easy because instead of typing the item repeatedly, you can click the list icon and quickly select an item from the pick list that appears. Your selection appears in the text field.

- To set a list icon to automatically appear when the cursor is placed in its field, select the **Pop-up automatically** option button.
- To set a list icon to automatically insert a default item when the cursor is placed in its field, click the list icon,

then select the desired default item and click the **Insert data automatically** option button.

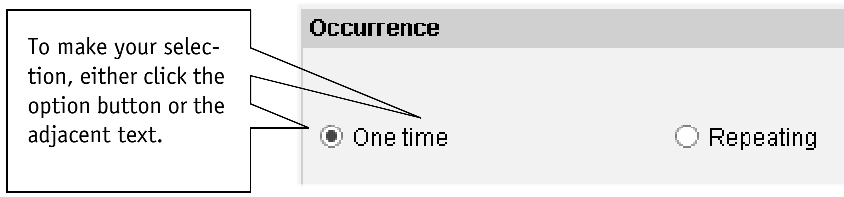


Main Menu

The main menu, located at the top of the application, provides access to all of the pages in Top Producer 7i. Hover the mouse over any of the feature menu items to display a submenu of related functions. Select the function you want, then click the left mouse button.

Option Buttons

Option buttons are used to present a selection between two or more choices, where only one may be selected at a time. A group of option buttons usually appears with one choice already selected as the default. Make your selection by clicking the circular option button or the adjacent text.



Selecting Items From Lists

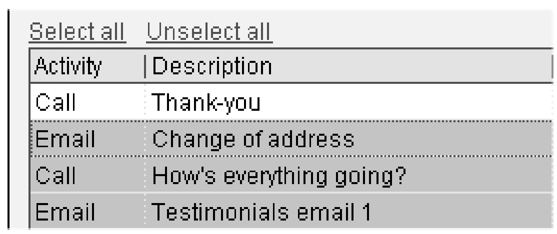
To work with single or multiple items, such as contacts, you will need to select them from various lists in Top Producer 7i.

To select items from lists:

1. Click an item once to select it.

   It will appear highlighted.

2. To select additional items, press the **[Shift]** or **[Ctrl]** key, then select the additional items.

Note: Some lists purposely allow only one item to be selected at a time.

3. To deselect items, press the **[Ctrl]** key, then select the items.

4. Some pages provide **Select all** and **Unselect all** commands. Use these commands to select and deselect ALL items in a list at once.

Shortcut Menu

When you right-click on highlighted text or an image in the body of a mailing or email message, a shortcut menu opens so that you can quickly select some editing commands. These editing commands use the clipboard to perform the same function as the corresponding toolbar icons.

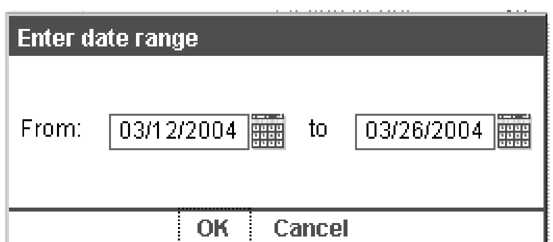
> **Note:** The list of available editing commands will vary slightly, depending on where you are in the program when you open the shortcut menu.

The shortcut menu commands include:

- **Cut** — cuts the selection.
- **Copy** — copies the selection to the clipboard.
- **Delete** — deletes the selection.
- **Paste** — pastes the cut or copied selection at the cursor insertion point in the document.
- **Select All** — highlights all contents within the document.
- **Hyperlink** — edits a selected hyperlink in the document. The *Edit hyperlink* pop-up window opens, letting you modify the URL or web site address, or change the link to ordinary text. Click **Test link** to check if the URL is working properly.
- **Properties** — edits a selected picture or picture merge code. The *Picture properties* pop-up window opens, letting you modify layout, spacing, and size attributes.

Specifying Date Ranges

To see information that was created or modified on a certain date (or specified date range), use the *Enter date range* pop-up window. The window appears throughout Top Producer 7i, usually from clicking a **Date range** link on a summary page. For example, you can specify whether you want to display listings that were created today, last week, or during a specific date range.



To specify date ranges:

1. Click the **Date range** link.

   The *Enter date range* pop-up window opens.

2. To specify a:

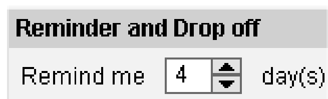
   - start date, click the **From** calendar icon.
   - end date, click the **to** calendar icon.

Note: There may or may not be an added check box called **No date range**. Selecting the check box will NOT allow you to filter out any records by date.

3. Click **OK**.

Spin Buttons

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



Setting Up

In this chapter:

Overview

Top Producer 7i is designed to run on Internet Explorer 5.0 and higher. Other browsers, such as Netscape, AOL, Compuserve, etc. are not supported. If you are unable to log on to Top Producer 7i due to a technical issue or version conflict with your web browser, see *"When you are unable to log in" on page 648* in the "Troubleshooting" section of this Guide.

Before you begin using Top Producer 7i, you will need to set up specific features and preferences of the program.

Other setup information that may only apply to you if you are using an added feature or peripheral, such as an MLS board or mobile phone. For information on setting up peripherals, see *"Applications Setup" on page 78*.

This section is meant to help you with setting up the required features of Top Producer 7i, including:

- logging in and out (see *page 30*).
- the Top Producer 7i Setup Wizard (see *page 33*).
- entering agent information (see *page 35*).
- entering assistant information (see *page 37*).
- adding your company logo and agent/assistant pictures (see *page 42*).
- setting up email accounts (see *page 48*).
- automatically applying action plans to leads (see *page 54*).
- setting up web sites for listing upload (see *page 57*).
- setting up *My customer* web pages (see *page 62*).
- managing published materials (see *page 70*).
- setting up envelope and label printers (see *page 72*).

Logging In And Out Of Top Producer 7i

To access Top Producer 7i, simply open your web browser (for example, Internet Explorer).

Note: If you get an error message that says you are unable to login to Top Producer 7i due to a technical issue or version conflict with your web browser, see *"Browser Setup" on page 644*.

To log into Top Producer 7i:

Click the **Did you forget your password** link and answer the secret question you entered during registration. You can reset your password.

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

   The *Login* page opens.

2. Enter your:

   - username in the **Username** field.
   - password in the **Password** field.

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

3. Click **Login**.

4. If:

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

     Depending on the type of issue, the *Configuration* *issue detected* page may appear. Read the disclaimer information. To accept the disclaimer and follow on-screen instructions to resolve the issue, select the **I have read and accept the terms of this agreement** option button, and then click **Next**.

From the *Configuration issue exists* page, you can either contact Top Producer Technical Support for assistance (see *"Contacting Technical Support" on page 18*), or follow the steps provided by clicking the **found here** link. If you've chosen to resolve the issue, follow the on-screen instructions.

- this is NOT your first time logging in, after a few moments, Top Producer 7i's main page is displayed. See *"The Top Producer 7i Setup Wizard" on page 33* for instructions on working with the Setup Wizard, or refer to the appropriate section in this guide for information on what you want to do.
- this is your first time logging in and you purchased Top Producer 7i through the online store, the *Welcome to the Top Producer Setup Wizard* page opens. For more information on working with the Top Producer 7i Setup Wizard, see *"The Top Producer 7i Setup Wizard", on page 33*.
- this is your first time logging in and you did not purchase Top Producer 7i through the online store, the Top Producer 7i *first time login* page opens, displaying the license agreement. Proceed to step 5.

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

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

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

   To specify a secret question, either:

   - select a preset item from the **Secret question** drop-down list.
   - enter your own secret question by selecting the **Enter my own secret question** check box, then entering your question in the text box below.

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

   The *Welcome to the Top Producer Setup Wizard* page opens. For more information on working with the Top Producer 7i Setup Wizard, see *"The Top Producer 7i Setup Wizard" on page 33*.

To log out of Top Producer 7i:

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

   The *Log out successful* page opens.

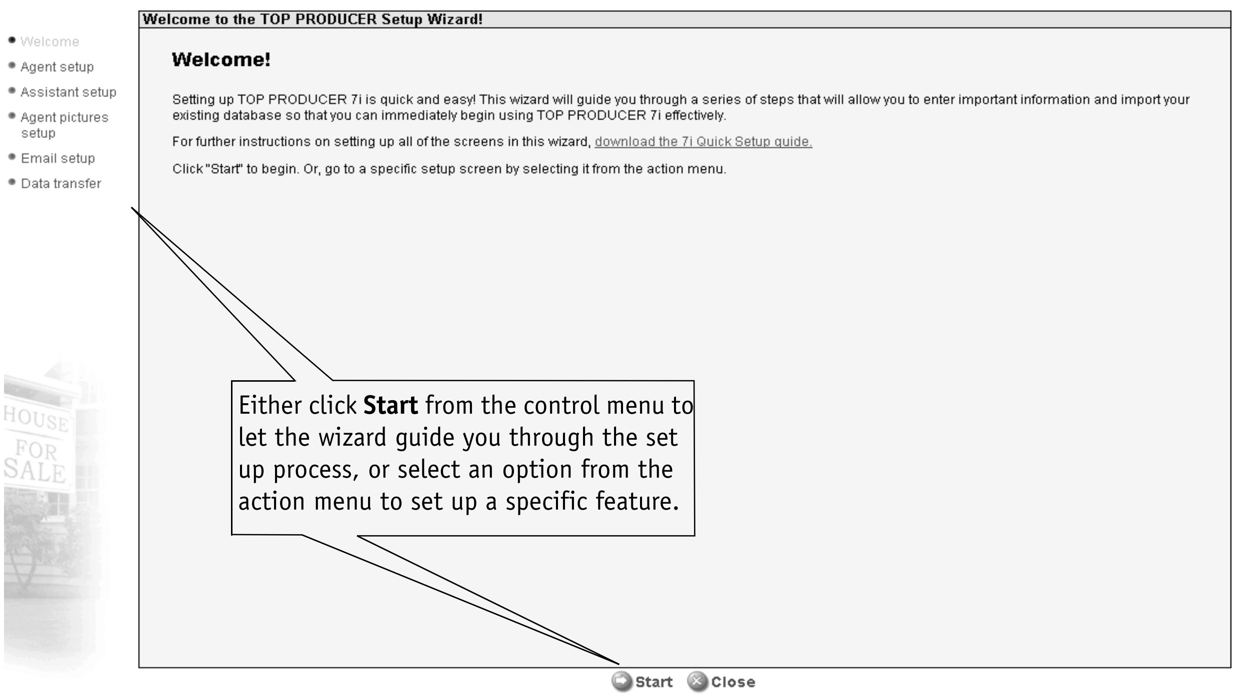
2. Click either the **Close** link or button.

The Top Producer 7i Setup Wizard

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

- specify agent information (see *page 35*)
- specify assistant information (see *page 37*)
- add agent and assistant pictures, as well as your company logo (see *page 44*)
- set up your email (see *page 48*)
- convert your desktop data or import data from a third-party application (see *page 602*)

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



To:

- let the wizard guide you through the set up process, click **Start** from the control menu and then proceed to *"Agent Setup" on page 35*.

- set up a specific Top Producer 7i feature, select an option from the action menu, and then proceed to the appropriate section in this guide.

Agent Setup

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

Specifying agent information

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

To enter agent information:

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

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

   The *Agent information* page opens.

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

Note: The **First name**, **Initial**, **Last name**, and **Company name** for the agent are already filled in and are not available for editing.

- Your email address will be entered automatically when you set up your email account. See *"Setting Email Preferences" on page 107*.
- You can enter a different address if you want replies to your emails sent to a personal email address.

Merge codes are special codes that can be inserted into a document. Each merge code represents a piece of information that Top Producer 7i retrieves from your database of user information.

Note: The salutation you specify in the **Closing salutation** field in the **Name details** section will appear at the end of letters, available from the Communication library, and will also be used for the **Agent.closing_salutation** merge code when you send a mass email or perform a mail out. For more information about the

Communication library, see *“Working with text” on page 315*

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

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

    - use the HTML editor toolbar to format selected text, cut and paste, insert pictures, insert a hyperlink or a horizontal line, (see *“Using the HTML Editor” on page 359*).
    - use the links to insert a company logo, insert a user photo, insert a marketing link or clear the signature.

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

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

7. If:

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

    If you have an assistant license, the *Setup wizard - Assistant setup* page opens. For information on specifying assistant information, see *“Specifying assistant information” on page 37*.

    If you do NOT have an assistant license, the *Setup wizard - Agent pictures setup* page opens. For more information on adding images, see *“Managing Teams And Partnerships” on page 44*.

Assistant Setup

If your subscription contains assistant licenses, you can enter your assistant's information, including their login information, and their name and contact information, which can later be inserted into correspondence. You can control access to certain features, or give them full access to your database so they can carry out the daily administrative tasks.

Specifying assistant information

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

To enter assistant information:

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

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

   The *Agent information* page opens.

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

   The *Assistants* page opens.

3. Click **Create new**.

   The *Assistant information* page opens.

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

   - enter the assistant’s login information (**Username** and **Password**).
   - select **Give this assistant access to create an email mailbox** to allow your assistant to set up their own email account.
   - select the applications you want your assistant to have access to. A license is required for each user (i.e., you and your assistant can't share a product license).

- select **Give this assistant access to Agent schedule** to grant your assistant access to your schedule.

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

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

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

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

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

    - use the HTML editor toolbar to format selected text, cut and paste, insert pictures, insert a hyperlink or a horizontal line, (see *"Using the HTML Editor" on page 359*).
    - use the links to insert a company logo, insert a user photo, insert a marketing link or clear the signature.

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

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

11. Click **OK**.

12. If:

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

The *Setup wizard - Agent pictures setup* page opens. For more information, see *“Managing Teams And Partnerships” on page 44*.

Sharing Assistants Among Agents

Sharing assistants among agents

Shared assistants have access to an unlimited number of agent, team and partnership accounts, and only one assistant license is required. Only accounts that are administered by the broker (i.e., broker-owned accounts or accounts that have accepted a workflow invite) can be shared. Shared assistants are created in BROKER TOOLS. For more information, contact your BROKER TOOLS administrator.

Log in preferences, including the default office you log into each time you access Top Producer 7i, are set on the Assistant setup page (see below). However, you can change the account you're logged into at any time (see *page 41*).

Setting your login preferences

Only the assistant can modify their login preferences.

To modify assistant information:

1. From the **Setup** menu, click **Assistant setup**.

   The *Assistant information* page opens.

2. Specify your **Login settings**:

   a) From the drop-down list, select the default account you want to log into each time you open Top Producer 7i.

   b) Select **Display the account selection prompt each time I log in** if you want to select which account to log into each time you open Top Producer 7i.

   If this option is not selected, you will not be prompted each time you access Top Producer 7i. You will automatically be logged into the account you set as default above.

3. Click **OK** to return to the main menu.

Logging into another agent’s account

If you are a shared assistant, you will have access to multiple agent, team and/or partnership accounts. You can log into any of the accounts your broker granted you access to. The account you are currently logged into is displayed in the bottom left.

The default account you log into each time you access Top Producer 7i is set on the Assistant information page.

To log into another account:

1. From the **Setup** menu, click **Change current account**.

2. From the drop-down list box on the *Change current Agent/Partnership/Team account* page, select the account you want to log into.

3. Click **Change account**.

   You are logged into the account you specified. When viewing any page in Top Producer 7i, look in the bottom left to confirm the account you are currently logged into.

Adding your company logo and agent/assistant pictures

This section tells you how to add agent and/or assistant pictures, as well as your company logo. Pictures must be in Joint Photographic Experts Group (.JPG or .JPEG) format.

To add images:

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

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

   The *Agent information* page opens.

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

3. To add a picture:

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

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

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

4. If:

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

The *Setup wizard - Email setup* page opens. For more information on setting up your email, see *“Setting Up Email Accounts” on page 48*.

Managing Teams And Partnerships

If you are the responsible agent of a team or partnership, and own the subscription, the **Team / Partner setup** menu item will be available to you from the **Setup** menu, where you can administer the agents that are part of your team or partnership account.

To manage your team/partnership you can:

- add a new agent to a team or partnership (see *page 44*).
- view or edit team or partnership information, such as the team's name and company logo (see *page 45*).
- view or edit an agent's information, such as their login information and program access (see *page 46*).
- temporarily prevent an agent from accessing the program (see *page 46*).
- remove an agent from a partnership or team (see *page 47*).

Adding an agent to a team or partnership

To add a new agent to a team or partnership:

1. From the main menu, highlight **Setup** and then click **Team / Partner setup**.

2. From the *Agent administration - View or edit [team/ partnership]* page, click **New agent** from the action menu.

> **Note:** The **New agent** action menu item will not be available if there are no more agent licenses free.

3. From the *Agent administration - New agent* page, complete the **Enter name and login information** section with the agent's name, username, and password information.

> **Note:** The **Username** and **Password** must each be a minimum of six characters.

4. In the **Assign product/add-on product licenses to this user** section, type the number of product licenses you want to assign in the **Quantity** fields. The number of available licenses is displayed next to each field, for your reference.

5. From the **Assign MLS access** to this user section, click the list icon to select which MLS board(s) you want to grant the agent access to.

Note: This section is not available if you do not have any MLS licenses available.

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

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

7. Click **OK** when finished; or click **Enter next** to add another agent.

Viewing or editing a team or partnership

To modify your team or partnership information:

1. From the main menu, highlight **Setup** and then click **Team/partner setup**.

2. From the *Agent administration - View or edit [team/partnership]* page, you can:

   - see the number of agent licenses you have available and a list of current agents in the team.
   - view or edit the name of the team in the **[Team/Partnership] name** text box.

3. To add or change pictures:

   - Click **Browse** to add a new picture from your computer. The *Select picture* pop-up window appears. Browse your computer and select the picture file to add. Click **Open**.

- Click **Remove** to remove the current picture.

Note: Removing a picture does not affect the local copy on your computer.

4. Use the **<<Previous** and **Next>>** buttons to view any other pictures you have loaded.
5. The picture(s) in view when you leave this page will be used as the default.
6. Click **Close**.

Viewing or editing an agent

Only the responsible agent (i.e., the account owner), can manage team/partnership accounts.

To modify an agent:

1. From the main menu, highlight **Setup** and then click **Team/Partner setup**.
2. Select the agent you want to modify.
3. Click **View or edit agent** from the action menu.
4. From the *Agent administration - View or edit agent* page, modify the agent's information. For more information, see *step 3 on page 44*.
5. Click **OK** when finished.

Preventing an agent from accessing the program

If you are the responsible agent (i.e., the account owner), you can temporarily revoke the agent's access to the program. This will prevent the agent from accessing the program, but it will not delete their account.

To suspend an agent

1. From the **Setup** menu, click **Team/Partner setup**.
2. Select the agent you want to suspend.
3. Click the **View or edit agent** action menu item.
4. From the **View or edit agent** page, select **Suspend this agent**.
5. Click **OK**.

   The **Suspend agent** dialog box opens.

6. Click **Yes**.

   The agent will be unable to access the program.

Removing an agent from a team or partnership

If you are the responsible agent (i.e., the account owner), you can delete an agent from your team or partnership. This will delete the agent's account and permanently prevent them from accessing the program.

> **Warning:** Deleting an agent will remove not only the agent, but also any assistants they have created.

To remove an agent:

1. From the main menu, highlight **Setup** and then click **Team / Partner setup**.

2. From the *Agent administration - View or edit [team/ partnership]* page, highlight the agent name in the list at the bottom of the page, and then click **Delete agent** from the action menu.

   > **Note:** You cannot delete the responsible agent.

   The *Delete agent* dialog box opens.

3. From the drop-down list box, select who you want to assign the agent's activities, leads, referrals, listings and closings to.

4. Click **Yes** to confirm the deletion.

   The agent account is deleted and all activities, contacts and transactions are assigned to the agent you chose.

Setting Up Email Accounts

Configuring your email account(s)

Before you can use the My email feature in Top Producer 7i, you need to set up your email account. You can configure My email to use the @topproducer.com domain, existing POP3 external account(s) or, if you have another email program you would rather use, you can choose NOT to use My email.

> **Note:** In order for you to access the email feature in Top Producer 7i, you must have been granted email access when your user account was created.

These instructions assume you are a new user setting up your email for the first time. The first time you try to use My email, you will be prompted to configure your email settings, if they are not already set up. If your email is already set up and you want to modify the settings, click the **Email configuration** action menu item from the *Email preferences* page. For information on changing your existing email settings, (see *"Changing your email configuration" on page 51*).

To set up your email account using the Top Producer domain:

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

You can also receive email from existing POP3 accounts into your @topproducer.com Inbox.

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

   The *Email configuration* page opens.

2. Select the **I want to use my @topproducer.com email address** option.
3. Specify a **Username** of your choice.
4. If:
   - you are using the Top Producer 7i Setup Wizard, click **Next**.
   - you are NOT using the Top Producer 7i Setup Wizard, click **OK**.

The *Confirm email address* message box opens. Click **Yes** to confirm the email address. The *Email setup* dialog box opens confirming the setup was successful.

5. Click **OK**.

   The system automatically saves the new email address in agent setup, (see *"Agent Setup" on page 35*). If you want your contacts to reply to a different email address, you must enter it in the **Contact information** section of the *Agent information* page.

   If you are using the Top Producer 7i Setup Wizard, the *Setup wizard - Data transfer* page opens. For more information on transferring your data, see *"Converting, Importing, And Exporting Data" on page 602*.

To set up your email account using an external POP3 account:

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

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

   The *Email configuration* page opens.

This option lets you send and receive email using the My email feature. Set up any number of POP3 accounts that you are using in different applications.

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

3. If you are:

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

4. Specify the following:

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

> **Note:** If you do not have this information, please contact your email service provider.

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

5. If you are:

   - using the Top Producer 7i Setup Wizard, click **Next**. The *Setup wizard - Data transfer* page opens. For information on transferring your data, see *"Converting, Importing, And Exporting Data" on page 602*.
   - NOT using the Top Producer 7i Setup Wizard, click **OK**.

To use your current email program by NOT setting up My email:

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

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

   The *Email configuration* page opens.

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

   You will still be able to send Flyers and other correspondence from Top Producer 7i and any outgoing email will display the email address you have specified in Agent setup.

3. If you are:

   - using the Top Producer 7i Setup Wizard, click **Next**. The *Setup wizard - Data transfer* page opens. For information on transferring your data, see *"Converting, Importing, And Exporting Data" on page 602*.
   - NOT using the Top Producer 7i Setup Wizard, click **OK**.

Changing your email configuration

Use the *Email configuration* page to manage your email accounts. You can set up accounts using the @topproducer.com domain, access your existing POP3 external accounts (NOT including Web-based email systems such as AOL or Hotmail), or choose to use an external program instead of My email in Top Producer 7i.

These instructions assume you have already configured your email settings and you want to change them or set up additional external accounts.

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

   The *Email preferences* page opens.

2. Click **Email configuration** from the action menu.

   The *Email configuration* page opens.

3. Choose one of the following options:

   - **I want to use my @topproducer.com email address** — specify your **Username** and click **OK**. The *Confirm email address* message box opens. Click **Yes** to confirm the email address. The *Email setup* dialog box opens telling you if the setup was successful. Click **OK**. You are returned to the *Email preferences* page.
   - **I want set up My email to receive messages from my POP3 accounts** — click **OK**. The *Remove existing mailbox* dialog box opens.

Note: Your existing @topproducer.com mailbox will be deleted, however, your email messages in the Inbox will remain. Any existing email messages in any of the other folders will be deleted. To keep these emails, you must forward them to a different email account.

   Click **Yes** to proceed. The *Remove existing mailbox* confirmation dialog box opens. Click **Yes** to proceed. The *Confirm email address* dialog box opens. Enter the email address and click **OK**. If you do not have a POP3 account set up, the *Add a new account* page opens, (see *“Adding a new external email account” on page 52*) below.
   - **I do not want to use the My email feature** — click **OK**. The *Warning! Your email will be deleted* message box opens.

Note: To keep any emails in all of the folders, you must forward them to a different email account.

Click **Yes** to continue.

Adding a new external email account

In order to access the *Accounts* page, where you can set up and manage your external POP3 email accounts, you must first set up an email account. Follow the instructions in *"Configuring your email account(s)" on page 48*.

To set up and manage external POP3 email accounts:

1. Point to **Setup**, **Preferences**, then click **Email**.

   The *Email preferences* page opens.

2. Click **External accounts** from the action menu.

   The *Accounts* page opens.

3. Click **Add a new account** from the action menu.

   The *Add a new account* pop-up window opens.

4. Enter your **POP3 server name** and **Port** (if required).

5. Enter your **Username** and **Password**.

Note: If you do not know your username or password information, please contact your email service provider.

6. Select the **Leave mail on server** check box if you want to leave your email messages on the POP3 server after you have downloaded them.

7. Select the **Only get new mail** check box if you want to download only new email messages from the POP3 server.

8. By default, email from your POP3 server is placed into the My email - Inbox. If you want your email to be placed into a different folder, select it from the **Move to folder** drop-down list.

   - Click the **Create folder** link to set up a new folder. Type a name and click **OK**.

Viewing or editing an email account

You can view or edit the settings for a POP3 email account. If you do not know the information, please contact your email service provider.

To view or edit the settings for an external POP3 email account:

1. From the *Accounts* page, highlight an account from the list.

2. Click **View or edit** from the action menu.

   The *View or edit account* pop-up window opens.

3. Make any changes to the **POP3 server** name, **Port**, **Username**, or **Password** fields.

4. Select or deselect the **Leave mail on server** or **Only get new mail** check box(es).

5. Make any changes to the folder you want for incoming emails.

6. Click **OK**.

Deleting an email account

Using the *Accounts* page, you can remove an external POP3 email account.

To delete an external POP3 email account:

1. From the *Accounts* page, highlight an account from the list.

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

   The *Delete account* dialog box opens.

3. Click **Yes** to confirm the deletion.

Automatically Applying Action Plans To Leads

You can set up Top Producer 7i to automatically apply action plans to leads. The *Auto apply action plan rules* page lets you define, view, edit or delete rules on how to apply action plans. For example, you could choose to apply the 2-month High-Touch Buyer Prospecting Plan to all leads.

You can also set up and manage rules for leads that are received in Top Producer 7i through the following methods:

- your REALTOR.com Marketing System
- a lead inquiry form

Adding rules

This section tells you how to specify which rules will automatically be applied when an action plan is applied to a lead.

To specify auto apply action plan rules:

1. Point to **Setup** and then click **Auto apply plans setup**.

   The *Auto apply plan rules* page opens. Click the **More information** link in the top right corner of the page for additional information on leads.

2. To add a rule, click **Add rule** from the action menu.

   The *Add auto apply plan rule - select source and inquiry form* page opens.

3. Select the source(s) and inquiry form(s) that you want the plan to be automatically applied to.

   - click the **Add**, **Edit**, or **Delete** links to modify the items in the **Source** and **Inquiry form** grids.

4. Click **Next**.

   The *Add auto apply plan rule - select contact type* page opens.

5. Select the contact types of lead (**Buyer** or **Seller**) that you want to apply the action plan to.

6. Click **Next**.

7. Select the plan(s) you want to apply to the leads from the **Available plans** box, then click **Add**.

> **Note:** Remember that when you apply a default plan, you cannot globally change the activities later. If you anticipate making changes, it is best to apply a personal plan, (see *"Creating an action, listing or closing plan" on page 233*).

   The plan(s) move to the **Applied plans** box.

8. Click **Next**.

   The *Add auto apply plan rule - selection summary* page opens.

Click **Previous** from the control menu if you want to make any changes.

9. Review the rules in the summary and then click **Next**.

   The *Add auto apply plan rule - enter rule name* page opens.

10. Specify a name for the rule in the text box, and then click **Finish**.

Modifying an existing rule

This section tells you how to view or modify the rules that are automatically applied when an action plan is applied to a lead.

To modify an existing rule:

1. Point to **Setup** and then click **Auto apply plans setup**.

   The *Auto apply plan rules* page opens.

2. Select the rule you want to modify and then click **View or edit rule** from the action menu.

   The *View or edit auto apply plan rule - select source and inquiry form* page opens.

3. Modify the rule details. Use **Next** from the control menu to modify different rule details. For example, if you want to modify the contact type that the rule is applied to, click **Next** to display the *View or edit auto apply plan rule - select contact type* page, and modify the details.

Note: For more information on modifying a rule's details, see *page 55*.

Deleting a rule

This section tells you how to delete an auto-apply plan rule. Once a rule has been deleted, the rule will no longer be used when an action plan is applied automatically.

To delete a rule:

1. Point to **Setup** and then click **Auto apply plans setup**.

   The *Auto apply plan rules* page opens.

2. Select the rule you want to delete and then click **Delete rule** from the action menu.

   The *Delete rule* dialog box opens.

3. Click **Yes**.

   The rule you deleted will no longer be used when an action plan is applied automatically.

4. Click **Close**.

Setting Up Listing Upload Web Sites

The listing upload feature lets you send listing data (via email) to any web site in Real Estate Exchange Transaction System (RETS)-compliant form, (see *"Uploading, Updating And Removing Web Site Submission Listings" on page 495*).

Before you can send listings to a web site, you must set up the web sites you will use.

Adding a listing upload web site

To add a listing upload web site:

1. Point to **Setup** and then click **Listing upload setup**.

   The *Setup web sites for listing upload* page opens. This page shows all web sites that have been set up for listings upload.

2. Click **Add web site** from the action menu.

   The *Add web site* pop-up window opens.

3. In the **Web site name** text box, type a descriptive name for the web site. You can use the URL itself, but you may want to enter a more meaningful name such as "My personal web site" to identify the web site.

4. Under **Upload method**, at the bottom of the page, select one of the following options for uploading a listing to the web site:

   - **Upload listing using FTP** — select this option if the web site supports direct upload methods and can accept your listing data via FTP. Then enter the **Web site URL** (ftp.servername.com), **Username** and **Password** information.
   - **Upload listing using HTTP-POST** — select this option if the web site supports direct upload methods and can accept your listing data via HTTP. Then enter the **Web site URL** (www.server-

name.com/hostapplication/gate), **Username** and **Password** information.

- **Send listing via email** — select this option if the web site does not support direct upload methods and your listing data will be sent via email to the web master, who will update the site for you. Then enter the **Email address** of the person responsible for updating the web site, usually the web master.
- **Upload listing to RETS server** — select this option if the web site supports the real estate transaction standard protocol (RETS). Then, enter a description in the **Web site name** text box, the **RETS server URL**, **Username** and **Password**.

5. Click **OK** to finish setting up the web site.

   The web site appears in the *Setup web sites for listing upload* page.

Adding an AdvancedAccess listing upload web site

You can export your listings from Top Producer 7i and upload them onto the AdvancedAccess web site.

To add an AdvancedAccess listing upload web site:

1. From the *Setup web sites for listing upload* page, click **Add web site** from the action menu.

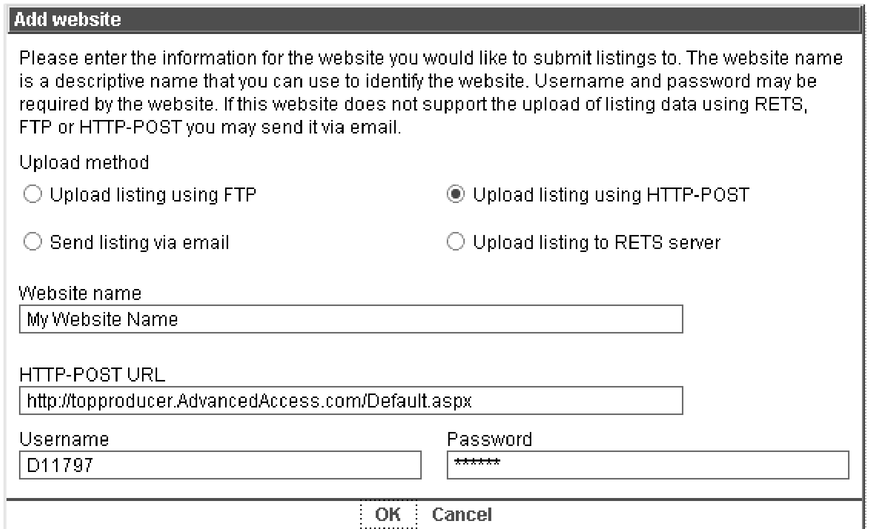
   The *Add web site* pop-up window opens.

2. Select the **Upload listing using HTTP-POST** option button.

3. Enter the following information:

   - In the **Web site name** text box, type a descriptive name for the site. This can be anything you want.
   - In the **HTTP-POST URL** text box, type the URL **http://topproducer.AdvancedAccess.com/Default.aspx**.
   - In the **Username** text box, you must enter your AdvancedAccess web site user name, (for example, **D11797**).
   - In the **Password** text box, you must enter your AdvancedAccess web site password.

Note: Your password is case sensitive and must be typed in with the correct use of upper and lower case characters.



4. Click **OK**.

Viewing or editing a listing upload web site

To view or edit a listing upload web site:

1. From the *Setup web sites for listing upload* page, highlight the web site you want to edit and click **View or edit web site**.

2. Enter/change the web site information as described in *“Adding a listing upload web site” on page 57*.

Removing a listing upload web site

To remove a listing upload web site:

1. From the *Setup web sites for listing upload* page, highlight the web site you want to remove and click **Remove web site**.

   The *Remove web site* dialog box opens.

2. Click **Yes** to remove the web site from the list of web sites available for listing upload.

Activating or deactivating a listing upload web site

To activate or deactivate a listing upload web site:

1. From the *Setup web sites for listing upload* page, highlight a web site from the list. The **Active** column will display the web site’s status.

2. If the web site is NOT active, click **Activate web site** from the action menu.

   The action menu item changes to **Deactivate web site** and the **Active** column displays **Yes**. You can now upload your listings to this site.

3. If the web site IS active, click **Deactivate web site** from the action menu.

   The action menu item changes to **Activate web site** and the **Active** column displays **No**. You are unable to upload your listings to this web site until you activate it.

Displaying Your Listing Data Using XML

If you are an advanced user, you can use an XML document to display listing data on your web site.

Note: This section is only for advanced users, such as web masters, or those who are familiar with uploading listing data.

The listing upload feature in Top Producer 7i lets you send your listing information to one or more web sites that support the Top Producer 7i Upload Standard. If you are a web master, or are familiar with XML, HTML and posting listing information to a web site, you can use an XML document to display your listings.

You must have the Adobe Acrobat Reader to view the White Paper in .PDF format.

While Top Producer Systems does not provide web hosting, we have included a Technical White Paper in HTML and PDF format to help you:

- determine which upload method is best for each web site or external system.
- identify the data fields that will be uploaded.
- convert the uploaded XML document to an HTML document by using a sample template that you can cut, paste, and modify.

To review the Technical White Paper from the online Help:

1. Log in to Top Producer 7i.

2. From the main menu, point to **Help**, then click **Help topics**.

3. From the **Contents** tab of the online help, click **[+]** to expand the **Setup** book.

4. Click **[+]** to expand the **Listing upload setup** book.

5. Click the **Listing upload setup** topic.

6. Click one of the Technical White Paper hyperlinks (available in either HTML or .PDF format).

Setting Up My Customer Web Pages

Top Producer 7i lets you create web pages where clients can view everything an agent has done to market and sell their home. Once a customer web page is created, the web address, along with a username and password, can be emailed to the client. The client can then access the web address and log in, viewing all of the services that an agent has performed in an effort to sell their home.

The customer web page displays buyer or seller information as determined by the representation setting on the *Closing details for [buyer/seller name]* page, (see *"Creating A New Closing" on page 511*).

Clients can log in to an agent's customer web page to view what's happening with the sale of their home.

This section tells you how to:

- create a customer web page (see *page 62*).
- make a customer web page available to a contact (see *page 64*).
- automatically generate a username and password (see *page 65*).
- email a username and password (see *page 65*).
- delete a customer web page (see *page 66*).

Creating a customer web page

To create a customer web page:

1. Point to **Setup** and then click **My customer web pages**.

   The *My customer web page setup — Appearance* page opens.

2. To add a picture, in the **Agent picture** area, click **Browse**.

   The *Select picture* pop-up window opens.

3. Browse your computer to locate a picture file, then click **Open**.

   The picture appears in the **Agent picture** area.

To remove a picture, click **Remove**.

Note: Picture files must be in .JPG or .JPEG format.

4. To add a company logo, in the **Company logo** area, click **Browse**.

   The *Select picture* pop-up window opens.

5. Browse your computer to locate a logo file, then click **Open**.

   The logo appears in the **Company logo** area.

To remove a logo, click **Remove.**

Note: Logo files must be in .JPG or .JPEG format.

6. If you are currently subscribed to Top Producer Websites, in the Web site preference area, select the **I have Top Producer Websites** check box. Then, type the domain name for your Web site in the space provided.

   Selecting this check box integrates your customer Web page with Top Producer Websites. Every time you modify your customer Web page settings and content, Top Producer 7i sends these changes to your Top Producer Websites account to ensure that your customer Web pages are up-to-date.

7. In the **Preferences** area, select the appropriate check box to specify whether you want to:

   - include cash expenses on the web page.
   - include agent names for showings on the web page.
   - be prompted to create a customer web page every time you publish or publish/send a marketing or closing service report. For more information about working with marketing or closing service reports, see *"Working With Marketing Service Reports" on page 473* or *"Closing Service Reports" on page 535.*

Note: If ALL of the buyers or sellers for a listing/ closing have had a web page created for them, the prompt will NOT appear. At least one buyer or seller must not have had a customer web page created for the prompt to appear.

8. Click **Next**. If you selected the **I have a Top Producer Websites** check box, this option will be disabled. Proceed to step 10.

   The *My customer web page setup — Text* page opens.

9. Edit any of the text that you want to display to your customers. If you have Top Producer Websites, this text is managed from your Top Producer Websites account.

10. If you are satisfied, click **Finish**.

    The *Customer web page setup* dialog box opens, showing you the address where the web page can be accessed.

11. Click **OK**.

Making a customer web page available to a contact

Once you have created a customer web page, you can make that web page available to contacts in your address book.

To make a customer web page available to a contact:

1. Point to **Contacts**, then click **Address book**.

   The *Address book* opens.

2. Find the contact you want to make a customer web page available for. For more information about working with contacts in the address book, see *"The Address Book" on page 128.*

3. Click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. At the bottom of the page, click the **Customer web page** tab.

   The *Customer web page* tab appears.

5. Click **Create a customer web page**.

   The *Web page created successfully* dialog box opens.

6. Click **OK**.

   For the contact to access the customer web page, you must generated a username and password, then email this information, along with the web address. For more information, see *"Automatically generating a username*

"and password" on page 65 and *"Emailing a username and password" on page 65*.

Automatically generating a username and password

Top Producer 7i will automatically generate a username and password for contacts to use when logging into a customer web page. When you email a contact regarding a customer web page, the username and password will be included. For more information about emailing a username and password, see *"Emailing a username and password" on page 65*.

To automatically generate a username and password:

1. Point to **Contacts**, then click **Address book**.

   The *Address book* opens.

2. Find the contact whose username and password you want to generate. For more information about working with contacts in the address book, see *"The Address Book" on page 128*.

You may also manually assign a username and password by typing in the **Username** and **Password** fields.

3. Click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. At the bottom of the page, click the **Customer web page** tab.

   The **Customer web page** tab appears.

5. Click **Generate username / password**.

   A username and password are generated, appearing in the **Username** and **Password** fields.

Emailing a username and password

Contacts must have a username and password to access a customer web page. You may email a username and password to a contact. When you email a username and password, the web site address where the customer web page is located is also included.

To email a username and password:

1. Point to **Contacts**, then click **Address book**.

   The *Address book* opens.

2. Find the contact whose username and password you want to email. For more information about working with contacts in the address book, see *"The Address Book" on page 128*.

3. Click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. At the bottom of the window, click the **Customer web page** tab.

   The **Customer web page** tab appears.

5. Click **Email username/password to this contact**.

   The *Mail login information* page opens.

6. If necessary, modify the subject line and body of the email. Text can only be changed on a per-customer basis. Default text cannot be set for this email, i.e., you cannot change it for all future emails.

7. Click **Send**.

   Top Producer checks the email addresses to ensure that they have the proper syntax and they do not have an unsubscribed email status. If there are any recipients with an unsubscribed email status, they are removed from the email and are displayed in a dialog box. Review this list and select the check box next to the contacts who you wish to add back to the email.

   The email is sent and the *Contact details for [contact name]* page reopens.

Deleting a customer web page

When you delete a customer web page for a contact, that contact will no longer be able to view any information about the sale of their home on the web.

To delete a contact's customer web page:

1. Point to **Contacts**, then click **Address book**.

   The *Address book* opens.

2. Find the contact with the customer web page you want to delete. For more information about working with contacts in the address book, *see "The Address Book" on page 128.*

3. Click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. At the bottom of the window, click the **Customer web page** tab.

The **Customer web page** tab appears.

5. Click **Delete customer web page**.

   The *Delete customer web page* dialog box opens.

6. Click **Yes**.

   The customer web page is deleted for the contact.

Setting Up Top Producer 7i To Communicate With Third-Party Applications

You can specify information about certain third-party applications so that these applications can retrieve information from Top Producer 7i.

From the *Data service setup* page you can:

- set up communication between a third-party application and Top Producer 7i (see below).
- modify a third-party application's information (see *page 69*).
- delete a third-party application's information from Top Producer 7i, preventing that application from retrieving information from Top Producer 7i (see *page 69*).

Setting up data services

Before a third-party application can retrieve information from Top Producer 7i, you need to enter the third-party application's name and user ID.

To set up communication between a third-party application and Top Producer 7i:

1. Point to **Setup**, and then click **Data services setup**.

   The *Data service setup* page opens.

2. Click **Add data service** from the action menu.

   The *Add data service* pop-up window opens.

3. Select the application name from the **Select a third-party application** drop-down list. All applications that are currently able to retrieve contact information from Top Producer 7i appear in this drop-down list.

4. Type your third-party application's user ID in the **Enter your user ID** field. If you do not know your user ID, contact that third party.

5. Click **OK**.

   You should now be able to retrieve Top Producer 7i contact information from the third-party application.

Modifying a data service

If you entered the third-party application’s user ID incorrectly, or you changed the user ID, you can modify this information in Top Producer 7i.

To update the user ID:

1. Point to **Setup** and then click **Data services setup**.

   The *Data service setup* page opens.

2. Select the data service you want to modify, and then click **Edit data service** from the action menu.

   The *Edit data service* pop-up window opens.

3. Modify your user ID.

4. Click **OK**.

Deleting a data service

If you no longer want a third-party application to retrieve contact information from Top Producer 7i, you can delete their information from the *Data service setup* page.

To stop communication between a third-party application and Top Producer 7i:

1. Point to **Setup**, and then click **Data services setup**.

   The *Data service setup* page opens.

2. Select the third-party application you want to remove.

3. Click **Delete data service** from the action menu.

   The *Delete data service* dialog box opens.

4. Click **Yes** to remove the data service's information.

   The third-party application will no longer be able to retrieve contact information from Top Producer 7i.

Managing Published Materials

From the *Published Materials* page, you can view and manage items that you have published to the Web, including flyers, presentations, and service reports. You can also set up an automatic purge schedule, delete materials that are no longer current, or see a live preview of a published item.

Accessing published materials

To access the Published Materials page:

1. Point to **Setup**, then click **Published Materials**.

   The *Published Materials* page opens.

2. Click the **List of categories** drop-down list to select a category of published material.

   The corresponding links from the selected category will be displayed in the list box.

   The list of published materials shows the description you entered to identify the item, the type of item published, the size of the item in kilobytes, and the date it was published. Click any heading to change the sort order.

3. At the bottom of the page, below the list of published materials, you can see the **Total materials published** (number), **Storage space used** (KB), and **Storage space available** (KB).

4. To automate the deleting of old materials, thereby saving space, click the **Automatically delete materials after** check box. Use the drop-down list to choose either **Days**, **Weeks**, or **Months**, and use the spin buttons to set the number.

Note: You can only automate the deletion of flyers and presentations — not service reports.

Deleting published materials

You can set up an automatic purge schedule, as described in step 5 of the previous section, or you can use the action menu to manually delete selected materials.

To manually delete published materials:

1. Click the **List of categories** drop-down list to choose a category.
2. Highlight the item in the list box of the *Published Materials* page.
3. Click **Delete** from the action menu.

   The *Delete published materials* dialog box opens.
4. Click **Yes** to confirm the deletion.

Live previewing

You can see a preview of what a selected presentation looks like when published to the Web.

To preview a published material:

1. Click the **List of categories** drop-down list to choose a category.
2. Highlight the item in the list box of the *Published Materials* page.
3. Click *Live preview* from the action menu.

   A new browser window opens, displaying the published content.
4. When you are finished previewing the item, close the browser window.

Setting Up Printer Defaults For Envelopes, Labels And Reports

You can set up printer defaults for:

- envelopes (see below).
- labels (see page 73).
- reports (see page 73).

Specifying envelope printer defaults

This section tells you how to specify printer defaults, such as the feed method and envelope size, to use when printing envelopes. If you do not set the defaults, you can specify printer settings at the time you print envelopes.

To set up your default envelope printer:

1. Point to **Setup**, **Printer setup**, and then click **Default Envelope Printer**.

   The *Default envelope printer* pop-up window opens.

> **Note:** The following printer setup options may vary slightly depending on your printer configuration.

2. To:

   - specify how the envelopes will be fed to the printer, select an option from the **Feed method** section.
   - specify the printer you want to use when printing envelopes, select an option from the **Printer** drop-down list.
   - specify the paper size, select an option from the **Paper Size** drop-down list.
   - specify the source tray for envelopes, select an option from the **Paper Source** drop-down list.
   - specify the envelope template you want to use, click **Select default envelope template**. Select

the appropriate envelope template and size, and then click **OK**.

3. Click **OK**.

Specifying label printer defaults

This section tells you how to specify printer defaults, such as the paper source and label size, to use when printing labels. If you do not set the defaults, you can specify printer settings at the time you print labels.

To set up your default label printer:

1. Point to **Setup**, **Printer setup**, and then click **Default Label Printer**.

   The *Default label printer* pop-up window opens.

2. To:

   - specify the number of labels per contact that you want to print, either type the number in the **Labels per contact:** text box or use the spin buttons.
   - specify the printer you want to use when printing labels, select an option from the **Printer:** drop-down list.
   - specify the source tray for labels, select an option from the **Paper Source:** drop-down list.
   - specify the size of label you want to use, click **Select default label template**. Select the appropriate label size and then click **OK**.

   A preview of the label template appears in the **Sample** area in the top left corner of the *Default label printer* pop-up window.

3. Click **OK**.

Setting default report orientation

You can specify whether you want reports printed in portrait or landscape orientation.

Note: Regardless of the settings you specify here, the Weekly Schedule report will always print in landscape orientation.

1. From the main menu, point to **Setup**, **Printer setup**, and then click **Default report orientation**.

   The *Default page orientation for reports* pop-up window opens.

2. Select the orientation you want reports to print in by choosing the appropriate option button.

3. Click **OK**.

   All reports (except the Weekly Schedule report) will print in the orientation you specified.

Clearing printer defaults

This section tells you how to clear printer defaults. If all printer defaults have been cleared, you will be prompted to specify printer settings when you print envelopes or labels.

To clear printer defaults:

1. Point to **Setup**, **Printer setup** and then click **Clear Default**.

   The *Clear defaults* dialog box opens.

2. Click **Yes** to clear all specified printer information.

Brokerage Workflows

If you are a Single Agent, or the Responsible agent of a Partnership or Team that is not part of a brokerage account, you can communicate the brokerage's Agent content communication library with a cooperating brokerage. This is known as Brokerage Workflow.

Setting up brokerage workflow

To set up brokerage workflow, you must first provide the broker/administrator with your Top Producer 7i user name. The broker will use your user name to send you an invitation.

To accept a workflow invitation:

1. Log in to Top Producer 7i.

   The invitation will appear.

2. Click **Accept** to accept the invitation. If you want more time to consider the invitation, click **Ask me later**. You will see the invitation again the next time you log in. If you do not want to accept the invitation, click **Decline**.

Note: You can set up workflow with one brokerage only.

Stopping communication with the brokerage

Once you have accepted a workflow invitation, you can use the *Workflow settings* page to cancel the workflow arrangement.

To change the workflow settings:

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

   The *Agent setup* page opens.

2. Click **Workflow settings** from the action menu. This item is only available if you have accepted a workflow invitation.

   The *Workflow settings* page opens.

3. If you want to stop communicating with the brokerage, click the **Stop communication with brokerage** link, then click **Yes** to confirm.

The Subscription Manager

The Subscription Manager enables you to manage your Top Producer product subscriptions. Using it, you can:

- update your contact information,
- view your invoice information,
- view your account history, etc.

Using the Subscription Manager

To use the Subscription Manager:

1. From the main menu in Top Producer 7i, select **Setup**, then **My subscriptions**. The *Subscriber Management* screen displays.

2 To view/modify your contact information:

- From the *Subscriber Management* screen's **Contact Information** line, click **Edit**.
- In the **Customer Information** section, make your modifications, then click **Update** to save the information and return to the *Subscriber Management* screen.

3 To view/modify your billing information:

- From the *Subscriber Management* screen's **Subscription Information** section, click one of your subscription's **Subscription Detail** button.
- To make changes, click **Edit Billing Information for this Subscription**.
- Modify the information, then click **Update** to save the information and return to the *Subscriber Management* screen.

4 To view your invoice information

- From the *Subscriber Management* screen's **Subscription Information** section, click **Invoices**.
- When you're finished, click **Back to Account Manager** to return to the *Subscriber Management* screen.

Applications Setup

In this chapter:

Overview

If you have a license for a Top Producer 7i add-on application, you can set it up using the **Applications setup** submenu in Top Producer 7i.

Accessing applications setup

From the main menu, point to **Setup**, **Applications setup**, then choose one of the following add on applications:

- Top Connector 7i MLS Connectivity (see *page 80*).
- Top Producer SellPhone (see *page 83*).
- Top Producer 7i for Handhelds (see *page 84*).
- Top Producer 7i Remote (see *page 89*).

Setting Up Top Connector 7i

Before you can download comparable data from your Multiple Listing Service (MLS) board into a Top Producer 7i presentation, you must first set up Top Connector 7i.

To set up Top Connector 7i you must:

1. Determine the type of module you are using (see below).
2. Set up either your Direct search module (see page 81), or your Import module (see page 82).

Determining which module type you have

There are two types of Top Connector 7i modules:

- **Direct search module —** if you have a Direct search module, you will perform searches directly from Top Producer 7i.
- **Import module —** if you have an Import module, you will perform searches in your MLS software, then save comparable data to a file, and then import that file into Top Producer 7i.

To determine which module type you have:

1. From the main menu in Top Producer 7i, highlight **Setup**, **Applications setup**, and then click **Top Connector 7i MLS Connectivity**.

   The *Top Connector 7i setup* page opens.

2. Select your MLS board.
3. If the:
   - **Login setup** action menu item is NOT available (i.e. the action menu item is disabled), your module is an Import module. For information on setting up an Import module, see *"Setting up your MLS board for an Import module" on page 82*.
   - **Login setup** action menu item IS available (i.e. the action menu item is not disabled), your module is a Direct search module.

Setting up your MLS board for a Direct search module

This section tells you how to set up your Direct search module to work with Top Connector 7i. Once you have entered this information, you can download comparables from your MLS board into your Top Producer 7i presentations.

Note: The following instructions assume you know your MLS username and password, and your IP address and port for your MLS board. If you do not have this information, please contact your MLS board for assistance.

To set up Top Connector 7i:

1. Point to **Setup**, **Applications setup**, then click **Top Connector 7i MLS Connectivity**.

   The *Top Connector 7i MLS setup* page opens.

2. Select the board you want to set up, then click **Login setup** from the action menu.

   Note: Only the module for your specific MLS board will appear in this list, unless you have ordered more than one Top Connector 7i module. If you are using more than one Top Connector 7i module, then you must set up each module according to these instructions.

   The *Login setup for [MLS board name]* page opens.

3. In the **Server information** section, specify:
   - the IP address (if necessary) in the **IP address** field.
   - the IP port (if necessary) in the **IP port** field.

   Note: If the board you selected in step 2 has the initials IP at the end of the board name, then you must enter the IP address and port as noted in step 3. Otherwise, you can leave these fields blank.

4. In the **Login information** section, specify:
   - your MLS board username in the **Password 1** field.
   - your MLS board password in the **Password 2** field.

5. Click **OK**.

   The *Set as default* dialog box opens.

6. Click **Yes** if you want this to be the default board.

   Each time you create a presentation, the default board will be used. For more information on creating presentations, see *"Creating A New Presentation" on page 409*.

Setting up your MLS board for an Import module

This section tells you how to specify the board that you want to use with Top Connector 7i. After you have completed this step, you can export comparable data from your MLS board, and then import this data into your Top Producer 7i presentations.

To set up Top Connector 7i:

1. Point to **Setup**, **Applications setup**, then click **Top Connector 7i MLS Connectivity**.

   The *Top Connector 7i MLS setup* page opens.

2. Select the board you want to set up, then click **Set as default** from the action menu.

   The **Default** status changes to **Yes**.

3. Click **Close**.

   For information on creating presentations, see *"Creating A New Presentation" on page 409*.

Setting Up Top Producer SellPhone

Top Producer SellPhone enables you to access your Top Producer 7i data over any Internet-enabled mobile phone. You can receive new leads and access your contact, property, listing and closing information from wherever digital cellular service is available.

Accessing the SellPhone settings

To access the SellPhone preferences:

1. Point to **Setup**, **Applications setup**, then click **Top Producer SellPhone**.

   The *Top Producer SellPhone preferences* page opens.

2. For details on setting your mobile phone preferences, see the Top Producer SellPhone User Guide, or the Online Help.

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

To use Top Producer SellPhone, you will require a Top Producer SellPhone license.

To download the Top Producer SellPhone User Guide:

1. Point to **Help**, then click **Download user guides**.

   The *Download User Guides* page opens.

2. Click the **Top Producer SellPhone User Guide** link; or the **Top Producer SellPhone Quick Start Guide** link.

   The selected User Guide opens in a new browser window.

Setting Up Top Producer for Palm Handhelds

To use Top Producer for Palm Handhelds you will require a Top Producer for Palm Handhelds license, and a Palm OS-based handheld device.

Top Producer for Palm Handhelds gives you access to your Top Producer 7i data any time, anywhere, with the portability of your Palm OS™-based, handheld device.

To download the Top Producer for Palm Handhelds User Guide:

1. Point to click **Help**, then click **Download user guides**.

   The *Download User Guides* page opens.

2. Click the **Top Producer for Palm Handhelds User Guide** link; or the **Top Producer for Palm Handhelds Quick Setup** link.

Note: If you own an older version of TPP (synchronizable or stand-alone). you will not be able to synchronize this version with Top Producer 7i. If you wish to be able to synchronize your handheld device with Top Producer 7i, use Top Producer for Palm Handhelds.

Importing data from a standalone version of TPP 2.0

You can import data into Top Producer 7i from an older standalone version of Top Producer for Palm Computing Connected Organizers 2.0 (TPP 2.0).

Please note the following points:

- Importing is a one-way process and you cannot send Top Producer 7i data to your standalone version of TPP 2.0. If you want to be able to synchronize your Palm handheld with Top Producer 7i, please subscribe to Top Producer for Palm Handhelds.
- Importing data from your Palm handheld will not change the data on the Palm, and you can continue using TPP 2.0.
- You must have TPP 2.0 to import data. Older versions of TPP will not work.

- You must have Palm Desktop installed on your computer to import the data.
- You may import data as many times as you want, however, importing the same data repeatedly will generate duplicate data in Top Producer 7i.

To import your standalone TPP 2.0 data into Top Producer 7i:

1. Place your Palm handheld in the cradle and press the **HotSync** button. If the HotSync process completes successfully, proceed to step 2. If not, please consult your Palm handheld user guide or Palm Technical Support.

2. From the Top Producer 7i main menu, point to **Setup**, **Applications setup**, then click **Top ProducerTop Producer 7i for Handhelds**.

   The *Handheld manager* page opens showing you a Device summary.

   Note: If the license is not found, a dialog box opens, click **OK**.

3. Click **Download Client Software** from the action menu.

   Note: To see these instructions online, click **Import instructions** from the action menu.

   The *File Download* pop-up window opens.

4. Click either:

   - **Save** — the *Save As* pop-up window opens. Navigate to a location on your computer to save the installation program (pcsiinst.exe), then click **Save**. Locate the file on your computer and click on it.
   - **Open** — the Top Producer for Palm Handhelds Installation wizard opens.

   It may take a few minutes for the software to download.

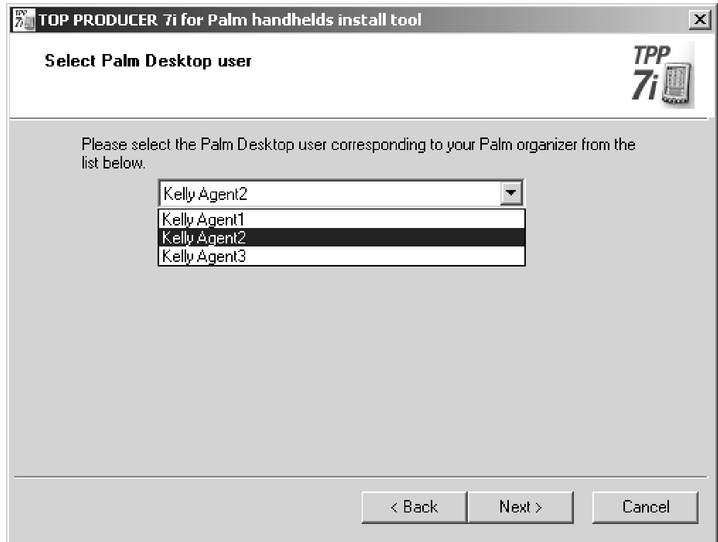
5. When the download is complete, the *Welcome to Top Producer for Palm Handhelds Setup* pop-up window opens. Click **Next**.

6. Follow the remaining on-screen prompts to install the software.

When the installation is complete, the *HotSync information* pop-up window opens.

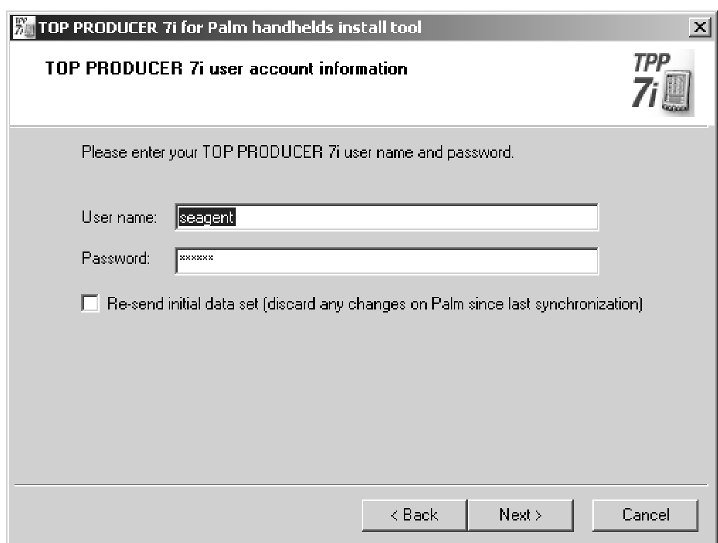
7. Read the information, then click **Next**.

   The *Select Palm Desktop user* pop-up window opens.



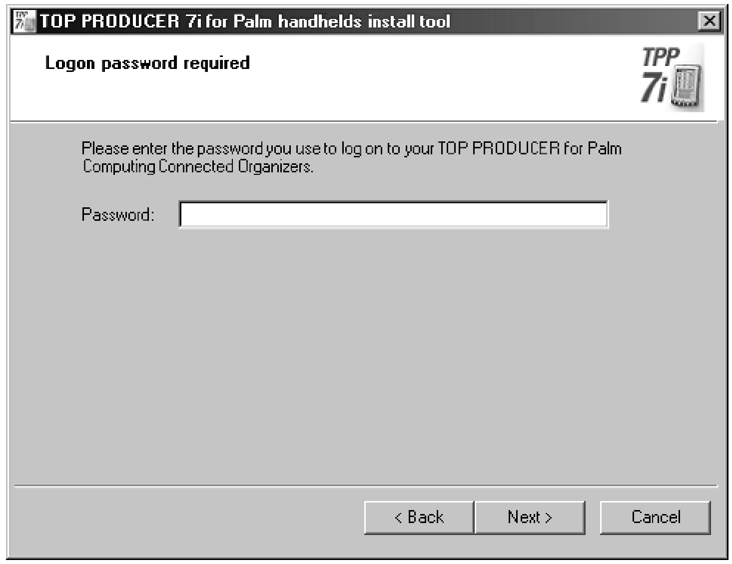
8. Click the drop-down list and select the name of the Palm Desktop user of the handheld device you are importing data from, then click **Next**.

   The Top Producer 7i *user account information* pop-up window opens.



9. Enter the **Username** and **Password** required to log in to Top Producer 7i, and then click **Next**.

The *Logon password required* pop-up window opens.



10. Enter the **Password** required to login to the standalone version of TPP 2.0 (leave this blank if you do not use a password), then click **Next**.

    The *Before you install* pop-up window opens.

11. Review the summary information, then click **Finish**.

    The *Installation successful - two more steps to completion* window opens.

12. Read the on-screen information instructing you to perform <u>two</u> HotSync operations. Click **Close** to exit the installation tool.

13. Make sure that the previous HotSync operation is fully completed before pressing the **HotSync** button a second time.

    Once the HotSync operation is complete, your data will have been imported into Top Producer 7i.

14. Open the Palm Desktop program and click **HotSync**, then **View log** to check that the operation was completed successfully.

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

Upgrading from a synchronizable version of TPP

If you have data in an old synchronizable version of TPP, you cannot import your data directly into Top Producer for Palm Handhelds. First, you must synchronize your handheld device with the desktop version of Top Producer (System 6 or 6i). Secondly, import your Top Producer Desktop data into Top Producer 7i. Finally, synchronize with Top Producer for Palm Handhelds.

WARNING: If you do NOT synchronize your handheld with the desktop version of Top Producer BEFORE deleting TPP 2.0, you may lose data.

For more information, please see your Palm User Guide.

Setting Up Top Producer 7i Remote

Top Producer 7i Remote is a desktop version of Top Producer 7i that does not need an Internet connection. The program lets you work with your database offline, allowing you to synchronize it later with Top Producer 7i to keep your database up-to-date with the most recent changes.

The following instructions guide you through setting up certain Top Producer 7i Remote options from Top Producer 7i. For more information on Top Producer 7i Remote, including detailed installation instructions, please see the Top Producer 7i Remote User Guide.

Accessing the Top Producer 7i Remote User Guide

To access the Top Producer 7i Remote User Guide:

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

   The *Download User Guides* page opens.

2. In the table, click the **User Guide** link.

Assigning a Top Producer 7i Remote license

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.

3. Click **OK**.

Downloading the Top Producer 7i Remote installation file

Use the Remote manager to download the Top Producer 7i Remote installation file onto your computer.

To download the Top Producer 7i Remote installation file from Top Producer 7i:

1. 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.

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

   The *File Download* pop-up window opens.

3. You can either:

   - open the file and begin the installation (see step 4)
   - save the file to your hard drive (see step 5)

4. Click **Open**.

   The Top Producer 7i Remote installation wizard opens.

> **Note:** For more information on using the installation wizard, please see the Top Producer 7i Remote User Guide, as discussed in *"Accessing the Top Producer 7i Remote User Guide" on page 89*.

5. To save the installation file to a location on your hard drive:

   a) click **Save**. The *Save as* pop-up window opens.

   b) from the **Save in** drop-down list, specify the drive where you want to save the file, for example, **C:**.

   c) select the folder you want to save the file in.

   d) note the name of the installation file (**TP7iRemote.exe**) in the **File name** field.

e) click **Save**. The file is saved to the location you specified.

6. Click **Close**. For detailed instructions on installing Top Producer 7i Remote, see the Top Producer 7i Remote User Guide, as discussed in *"Accessing the Top Producer 7i Remote User Guide" on page 89*.

Accessing the Remote manager

To access the Remote manager in Top Producer 7i:

1. 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.

2. All Top Producer 7i Remote users appear in the grid. View the following information:

   - the user's name in the **License owner** column
   - the remote license's current status (for example, Synchronization pending) in the **Status** column.
   - when the Top Producer 7i Remote license was assigned to the user in the **Registered** column
   - when the user last synchronized their data in the **Last used** column.
   - the device number in the **Device #** field.

     A unique device number is assigned to each computer that you install Top Producer 7i Remote on. This number is used for identification purposes when you synchronize with Top Producer 7i Remote.

3. Click **Close**.

Using the Remote manager

The *Remote manager - user summary* page allows you to manage Top Producer 7i Remote users.

To view a Top Producer 7i Remote user summary:

1. 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.

2. Select the user that you want to view, then click **View** from the action menu.

   The *Remote manager* page opens.

3. Review the selected user's information.

4. Click **Close**.

To remove a user's Top Producer 7i Remote access from Top Producer 7i:

1. 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.

2. Select the user that you want to remove Top Producer 7i Remote access from, then click **Delete** from the action menu.

   Note: If you have NOT yet downloaded your Top Producer 7i data into Top Producer 7i Remote, skip to step 4.

   If you have already downloaded your Top Producer 7i data into Top Producer 7i Remote, the *Delete license* dialog box opens.

3. To:

   - synchronize your data before removing Top Producer 7i Remote access, click **No**. **This is recommended**. For information on performing a synchronization, see the Top Producer 7i Remote documentation.
   - NOT synchronize your data and remove Top Producer 7i Remote access from the specified user, click **Yes**. Skip to step 4.

4. When the *Free up license* dialog box opens, click **Yes**.

   The specified user will no longer have access to Top Producer 7i Remote, and the license is available for another user.

To view a user's synchronization log from Top Producer 7i:

1. 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.

2. Select the user whose synchronization log you want to view, then click **View log** from the action menu.

   The *Synchronization log* page opens.

3. To view:

   - synchronization performed on a specific computer, select the device from the **Device #** drop-down list.

     A unique number is assigned to each computer that you install Top Producer 7i Remote on. This number is used for identification purposes when you synchronize with Top Producer 7i.
   - synchronizations that occurred within a specific time frame, enter these dates in the **from** and **to** fields, or click the calendar icons.

     All synchronizations matching your search criteria appear in the list.

4. To view a specific synchronization, select the event, then click **View event** from the action menu.

   The *Remote manager* page opens, displaying information such as the date and time the synchronization occurred.

5. Click **Close**.

   The *Synchronization log* page reopens.

6. Click **Close**.

   The *Remote manager - user summary* page reopens.

Setting up Top Marketer

What is Top Marketer?

Top Marketer is a powerful Web lead generation service that will help you:

- Facilitate the home search process so that you are the first point of contact for initial home inquiries.
- Maintain a relationship between yourself and the prospect via regularly scheduled Market Snapshot reports.
- Inform you the moment a consumer requests a Home Market Report (HMR) or Comparative Market Analysis (CMA).
- Assist you in following up with those prospect leads, so you can start cultivating a strong relationship with them until they're ready to sell.

More and more buyers and sellers are flocking to the Web for real estate information – in fact, 77% of consumers now use the Internet for their home search inquiries.

With an emphasis on Internet inquiries, it is crucial that you have a physical presence on the Internet so that you can start building relationships with these potential sellers who will eventually become the foundation of your contact database for years to come.

How does Top Marketer work?

When a consumer requests information regarding the current value of their home, the HMR request will be sent directly to your Top Producer 7i Lead Manager. Your email reply will contain both the HMR and a URL that will allow the consumer to request a CMA via a web form when they are ready to initiate this home selling process with you.

While you are producing the HMR, a Market Snapshot report branded with your photo, logo, and contact information is automatically created and sent to the consumer. The Market Snapshot report will continue to be generated and sent to the consumer at a regular interval until you either cut it off from the Top Marketer Control Panel or else

Soon after this request is submitted, this CMA request will appear in your Top Producer 7i Lead Manager.

For more information on:

- how Top Marketer works, see *“Receiving leads from Top Marketer” on page 96*.

- setting up your profile as it will appear on a web site, see *“Setting up your profile from the Top Marketer Control Panel” on page 95*.

Setting up your profile from the Top Marketer Control Panel

The Top Marketer Control Panel allows you to modify your agent profile, which will be displayed on various web sites. You can change your address, contact information, company logo and photo (see *page 96*). You can also view your account billing (see *page 97*) and license agreement information (see *page 100*) from the Control Panel.

To modify your agent profile:

1. From the **Setup** menu, under **Applications setup**, click **Top Marketer Control Panel**.
2. If you are logging on for the first time, the End User License Agreement (EULA) appears. You must agree to the terms before you can access the Top Marketer Control Panel.

   The Top Marketer Control Panel screen launches in a separate browser window.
3. Your first and last names are automatically populated. These are read-only fields.
4. Enter your **Address**, **Office number**, and **Cell number**.
5. Enter an email address.
6. If available, enter the URL for your web site.
7. Select the **Language** by clicking the scroll bar.

> **Tip:** Hold the **Ctrl** key and click on the languages to select multiple languages.

8. Enter a short biography.
9. Click **Update** to save the information to the Top Marketer database.
10. Click **Preview** to view your agent profile, as it will appear on various web sites.

To change your Photo or Company logo

1. Click **Change [Photo/Logo]**.
2. Click the **Browse** button to find the photo you want to add.
3. In the *Choose file* dialog box, select the photo or logo.
4. Click **Open**.

   The file name is displayed in the *Upload [Agent Photo/ Company Logo]* dialog box.
5. Click **Update Photo**.

   The new photo or logo is displayed in the Control Panel.

Receiving leads from Top Marketer

How does Top Marketer work?

1. You set up your profile in the Top Marketer Control Panel. For more information, see *"Setting up your profile from the Top Marketer Control Panel" on page 95*
2. A consumer requests information on the value of their home from a web site.
3. Top Marketer sends this lead request into Top Producer 7i. This request appears in your Top Producer 7i Lead Manager with a status of **New - HMR Requested**.
4. You create an HMR for the lead and send the presentation in an email that also contains a link to a Comparative Market Analysis (CMA) request web form.
5. If the lead clicks this link and fills out the web form, this additional request appears in your Top Producer 7i Lead Manager with a status of **New - CMA Requested**, along with the lead's phone number.
6. You follow up with the lead and acquire more information in order to create a detailed CMA.
7. You create a detailed CMA and send it to them via email.

Understanding the Account Statistics information

The Account Statistics page displays your billing and lead information, including the billing cycle's start and end dates, the zip/postal codes you have subscribed to, and how many leads have been received.

To view your account statistics information:

1. From the **Setup** menu, under **Applications setup**, click **Top Marketer Control Panel**.
2. Click the **Statistics** button in the bottom left.
3. This page lists the following:
    - **Billing Period:** Indicates the current billing period. Includes the start and end dates of the Top Marketer billing cycle.
    - **Zip / Postal Codes Requested (Leads received per zip / postal code):** Indicates the zip codes you have subscribed to for the current billing period. The number of leads received per zip code is indicated in brackets. This number does not include duplicate leads.
    - **Max # Leads Requested:** Indicates the maximum number of leads requested for the current billing period.
    - **# Leads Received:** Indicates the number of leads received in the current billing period.
    - **Total Leads Received Since [date]:** Indicates the total number of leads received since you signed up for Top Marketer. This number will include duplicate leads for which you are not billed.
4. Click **Back to Control Panel** to return to the Top Marketer Control Panel.

Enabling the Market Snapshot

A Market Snapshot is an automatically generated report based on your prospect’s home selection criteria. The Market Snapshot contains agent information, listing details of current properties listed and sold, and graphs of home market trends. At the bottom of the snapshot a “Contact Me” link allows the prospect to send you a message asking any questions which are not covered by the snapshot.

Prospects can define a regular period for market snapshots to be generated and sent to them. You can cut off a prospect’s subscription to the Market Snapshot feature from the Market Snapshot Lead History screen.

> **Note:** The Market Snapshot feature will only be visible if your MLS supports the feature.

To enable the Market Snapshot:

1. From the Top Marketer Control Panel, select **Market Snapshot**, then click **Agent Setup**.

2. Select the **Send Market Snapshot to TM leads** checkbox.

3. Select one of the **Minimum Listing Required** radio buttons.

   If you select the **Request at least 1** option, the Market Snapshot will not be generated unless at least one listing has been listed or sold recently within the prospect's area. If this occurs, you will be sent an email message informing you of the event and including the prospect's contact information so that you can contact the prospect directly.

4. Enter your MLS ID and password in each available MLS row. The MLSs are added to your account by your Top Marketer coach at your request.

5. Click **Update**.

Viewing Top Marketer lead histories

Each lead received from Top Marketer is listed in the Lead History area. From the Lead History area, you can stop a lead's regularly scheduled Market Snapshot reports, and view the lead's details complete with the lead's source, market snapshot criteria, and contact information.

To review Top Marketer lead histories:

1. From the Top Marketer Control Panel, select **Lead History**.

   - To stop a lead's regularly generated Market Snapshot report, click the **Stop** link in **Stop MS** column of the lead's row.
   - To send a Market Snapshot to a lead, click the **Create** link in the **Create MS** column of the lead's row and fill out the report criteria.
   - To view a lead's details, click the **View** link in the **Details** column of the lead's row.

2. To close the screen, click **Back to Control Panel**.

Sending Market Snapshots to a Contact

Market Snapshot reports are automatically generated for leads generated via Top Marketer, but you can send a Market Snapshot report to a Top Producer contact from the contact's Details screen within Top Producer 7i.

To send a contact a Market Snapshot:

1. From the Contact Details screen, select **Generate Market Snapshot** from the Action menu.

   The Generate Market Snapshot screen appears.

2. Define the contact's search criteria.

3. Click **Generate a Market Snapshot**.

   The Market Snapshot is generated and sent to the contact.

   The action of sending the report will be recorded in the contact's history. In addition, every time the contact views the report an event is recorded and displayed in the contact's history.

Viewing a contact's Market Snapshot history

A contact's Market Snapshot activity is captured and displayed in their Contact History screen. From the History screen, you can view the times that Market Snapshot reports were sent, the times that the contact has viewed the report, and the times that report generation has failed.

To view a contact's Market Snapshot activity:

1. From the Contact Details screen, select **View History** from the Action menu.

   The Contact History screen appears.

2. From the **Select the type of history items you want to view drop-down list**, select **To-do** items.

   Sent reports, viewed reports, and failed reports are displayed in the history area, along with any other To-do items.

3. To view a contact's Market History report, double-click a “Snapshot Sent” entry to open the item and click **Notes** in the Action menu. The item's notes will contain a hypertext link to the contact's Market Snapshot Report.

Note: The history of leads received from Top Marketer can be viewed in the same manner as preexisting contacts.

End User License Agreement

The first time you attempt to access your Top Marketer Control Panel, you will see the Top Marketer End User License Agreement (EULA). Read it carefully before accepting the terms. This EULA can also be viewed at any time.

To view your EULA:

1. From the **Setup** menu, under **Applications setup**, click **Top Marketer Control Panel**.

   The Top Marketer Control Panel opens.

2. Click **Display EULA**.

   Your EULA opens.

Setting Preferences

In this chapter:

Setting General Preferences

You can:

- set which feature you want displayed each time you start Top Producer 7i (see below).
- specify user settings, including disclaimer information, whether to check for duplicate contact records, and more (see *page 103*).
- set the ability to multitask in Top Producer 7i (see *page 104*).

Setting which feature to display on start up

This section tells you how to load a certain feature, which will be displayed each time you start Top Producer 7i.

To specify which feature to display on start up:

1. Point to **Setup**, **Preferences**, and then click **General**.

   The *Preferences* page opens.

2. In the **Auto display on start up** section choose which feature, if any, you want to be displayed when you start the program:

   - **Home**: Select **Home** if you want to display the Dashboard each time you open the program. For more information, see *“About the Dashboard” on page 112*.
   - **Today's business**: Select **Today's business** if you want Today's business displayed each time you open the program.
   - **New leads**: Select this option if you want to display the Lead manager each time you open the program.
   - **Address book**: Select this option if you want to display the Address book each time you open the program.
   - **My email**: Select this option if you want to display My email each time you open the program.
   - **None**: Select this option if you do not want to display any feature.

3. Click **OK**.

Specifying user settings

You can set program preferences, including the default message body to use when publishing items to the web, whether to check for duplicate contact records, how Home Market Reports (HMRs) are sent, and more.

To specify user settings on the Preferences page:

1. Point to **Setup**, **Preferences**, and then click **General**.

   The *Preferences* page opens.

2. To:

   - include a disclaimer on **Flyers**, **Mass emails**, and **Presentations**, enter the disclaimer in the **Disclaimer** text box, and then select the correspondence you want this disclaimer to appear on. For example, if you want the disclaimer to automatically appear on flyers, select the **Flyers** check box.
   - be notified when all listings are about to expire, select the **Show listing expiration reminders** check box.
     A reminder will be displayed of all listings expiring when you start the program.
   - include date and time information on any notes entered into Top Producer 7i, select the **Include date, time and created by stamps in notes** check box.
     Every time notes are entered into Top Producer 7i the date, the time and person who entered the note will be included.
   - notify you when a duplicate record is about to be added, select the **Always check for duplicate contacts** check box.
     Selecting this option lets you specify how duplicate records will be handled when contacts are created, and when leads and referrals are accepted in Top Producer 7i.
   - specify the default body text to be displayed when service reports, flyers, and presentations are posted on the web, in the **Publishing messages** section, click the **Message type** drop-down list and choose an option from the list. Enter the default message text to use when you email the web link to your contacts.
   - make the DOM (days on market) value editable in all new presentations, select the check box in the

CMAs, Buyer presentations, and Home Market Reports section.

- specify how you want to send Home Market Reports (HMRs), select the appropriate option button in the **CMAs, Buyer presentations, and Home Market Reports** section.

  If you want to send HMRs as a URL link of the .PDF format, select the **Send Home Market Reports as a link and thumbnail** option.

  If you want to send HMRs as a .PDF attachment, select the **Send Home Market Reports as an Adobe® .PDF file** option.

  Each time you send an HMR, you have the option to specify how to send the report (i.e. as either a link or an attachment). To receive this prompt each time you send an HMR, select the **Ask me every time I send a Home Market Report** check box.

3. Click **OK**.

Setting the ability to multitask in Top Producer 7i

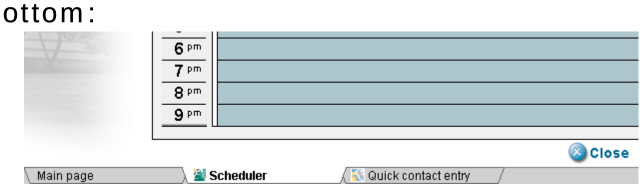
If you have the option selected on the *Preferences* page, you can access up to four additional pages while performing a task. For example, you are creating a listing in Top Producer 7i and a client calls asking what time their showing is. Instead of saving and closing the listing file to look up details in the Scheduler, you can click the Scheduler icon on the main menu bar and the Scheduler will open in a separate window. Your listing file will remain open in the Main page window until you can resume working on it.

Currently there are three pages you can access while another page is open:

- Scheduler (see page 254).
- Quick contact list — a list that displays all contacts in your database. You can also look up a contact's details. See page 132.
- Quick contact entry (see page 126).

» Click one of the three icons on the right side of the main menu bar to open a new page:

» To switch between open pages, click the tabs along the bottom:



To set up multitasking:

1. Point to **Setup**, **Preferences**, and then click **General**.

   The *Preferences* page opens.

2. Select the **Show quick access icon toolbar** check box.

3. Click **OK**.

   The *Settings updated successfully* page opens, informing you that you will have to log out and log back in before this feature will be available.

4. Click **OK**.

Setting The Scheduler Preferences

This section tells you how to specify the settings for how the scheduler will appear each time it's displayed.

To set scheduler preferences:

1. Point to **Setup**, **Preferences**, then click **Scheduler**.

   The *Scheduler preferences* page opens.

2. In the **Appearance** section, specify:

   - the view you want displayed each time the scheduler is opened. Use the **Display the** drop-down list to select the day, week, month, or year view.

   Note: The user must log out of Top Producer 7i and log back in before this setting will take effect. For more information on logging in and out, see *"Logging In And Out Of Top Producer 7i" on page 30*.

   - whether you want the time displayed in 15, 30, or 60 minute intervals by choosing the appropriate option in the **View times in** drop-down list.
   - how long the work day is. Type the start time in the **Work day starts at** text box or use the spin buttons. Type the end time in the **and ends at** text box, or use the spin buttons.

3. Click **OK**.

   The settings you specified will take effect the next time the Scheduler is displayed.

Setting Email Preferences

Before you can use the My email feature or set up your email preferences, the program will prompt you to configure your email account(s) see *“Configuring your email account(s)” on page 48*. Then, once you’ve configured your email, you can specify your email user preferences, which includes setting up an out of office auto reply and granting assistants access to your email.

To set your email preferences:

1. Point to **Setup**, **Preferences**, then click **Email**.

   The *Email preferences* page opens.

2. Select one or more of the following check boxes:

   - **Save sent emails in the sent items folder**, ensures that a copy of every email you send is placed in the **Sent items** folder.
   - **Allow my assistants to access my email**, lets you grant access to your assistant to access your email.
   - **Enable ‘Out of the office auto-reply’**, lets you enable the option and type a message that will automatically reply to all incoming email when you are away from the office.

   Note: The **Enable Out of the office auto-reply** is not enabled when you only have POP3 external email account(s) set up.

   ---

3. Click **OK**.

Changing your username

You can change your @topproducer.com domain username. The action menu item is not available if you are using existing POP3 accounts.

To change your @topproducer.com domain username:

1. From the *Email preferences* page, click **Change username** from the action menu.

   The *Change username* page opens. The **Username** text box displays the first part of your email address.

2. To change your current username, type a new one in the text box.

3. Click **OK**.

Setting up POP3 email accounts

You can add, edit, and delete your external POP3 email accounts from the *Email preferences* page. For information on setting up a POP3 email account to be accessed in Top Producer 7i, see *“Setting Up Email Accounts” on page 48*. For information on adding external POP3 email accounts, see *“Adding a new external email account” on page 52*.

Changing your email configuration

Use the *Email configuration* page to manage your email accounts. You can set up accounts using the @topproducer.com domain, access your existing POP3 accounts, or choose to use an external program instead of My email in Top Producer 7i, (see *“Changing your email configuration” on page 51*).

Setting Listing Preferences

This section tells you how to determine how listing expiration dates and expiration reminders will be calculated.

To set listing preferences:

1. Point to **Setup**, **Preferences**, and then click **Listing**.

   The *Listings preferences* page opens.

2. In the:

   - **Expiration date** field, specify how many days must pass before a listing becomes expired.
   - **Expiration reminder** field, specify how many days before a listing expires that you want to be reminded about the upcoming expiration, (see *"Setting Listing Expiration Reminders" on page 506*).

3. Click **OK**.

Viewing the Unsubscribe Text

Federal Can-Spam laws require the inclusion of unsubscribe options (i.e., the ability for your email recipients to opt out of receiving email messages from you in the future) in all email communications. To this end, Top Producer 7i inserts a "How to unsubscribe" message and Unsubscribe link into all email messages. Recipients who click this Unsubscribe link will be identified in your contact database as being unwilling to receive future email.

You can prevent the unsubscribe link from appearing on email messages sent from the Compose Email screen (see *page 352*). However, all correspondence sent using the Mass Email feature (i.e. flyers, presentations, customer web pages, email activities, action plan email and service reports) will contain the unsubscribe link.

Notes: The unsubscribe text cannot be modified.

This text is not displayed when you are creating the email message. It will be appended to your email after you send it.

To view your unsubscribe preferences

1. From the **Setup** menu, under **Preferences**, click **Unsubscribe**.

   The unsubscribe text that appears on outgoing email messages appears in the **Unsubscribe text sample** section.

2. Click **OK**.

The Dashboard

In this chapter:

About the Dashboard

The Dashboard provides a snapshot of the day's activities, displays any new leads, and provides shortcuts to many of the program's main features. Set the option to display the Dashboard each time you log in to stay organized and efficiently perform tasks from one main page. For more information on specifying startup options, see *“Setting which feature to display on start up” on page 102*.

From the Dashboard you can:

- Manage activities (see *page 113*).
- Perform follow-up actions for leads (see *page 115*).
- View a list of contacts, search for and display a contact's record, and view and manage your favorites (see *page 117*).
- Quickly add a contact or activity (see *page 119*).

To open the Dashboard:

- From the main menu, click **Home**.

Working with Activities from the Dashboard

All the appointments, calls and to-do activities for the day are displayed in the Today's Activities section in the Dashboard. You can manage your activities and view your partner/team/assistant activities (if applicable).

Additionally you can quickly add activities from the Dashboard. For more information, see *"Adding Contacts and Activities from the Dashboard" on page 119*.

Important: Scheduled appointments or timed calls that are not linked to a contact record will be deleted from your database after one year.

If you don't want them deleted, make sure that you link them to the associated contact record when you schedule them. Doing this allows you keep a permanent database record of appointments and calls.

To work with Today's Activities:

1. To open the Dashboard, from the main menu, click **Home**.
2. From the **Show** drop-down list, select whose activities you want to view.
3. If many activities are listed, click **Expand** to view more activities. Click **Collapse** to return to the previous view.
4. Click **Show outstanding items** to view a complete list of activities, regardless of date, from Today's business.
5. To view activities for another day, click the appropriate date from the calendar on the right. Bolded dates indicate there are activities scheduled for that day.

A dialog box opens, displaying the appointments and calls for the selected date.

6. Contacts associated with the activity are displayed in the **Contact** column. Click the contact's name to display their details below in the **Contacts** section.

7. Click the **View/Edit** icon () adjacent to an activity to modify it. For more information, see *“Modifying An Activity” on page 266*.

8. Click the **Mark done** icon () adjacent to an activity to mark it done. More Info:

9. Click the **Delete** icon () adjacent to an activity to delete it. When the *Delete activity* dialog box opens, click **Yes**.

   The activity is removed from **Today's Activities**.

Working with Leads from the Dashboard

The **Today's New Leads** section displays any new leads you have received each time you open Top Producer 7i. Perform follow-up actions, such as applying an action plan, creating a presentation and sending an email. You can also access a lead's contact record and the Lead manager from the Dashboard.

Additionally, you can quickly add a lead from the Dashboard. For more information, see *"Adding Contacts and Activities from the Dashboard" on page 119*.

Note: If there are no new leads, the **Today's New Leads** section won't be displayed.

To work with leads from the dashboard:

1. To open the Dashboard, from the main menu, click **Home**.

2. From the **Show** drop-down list, select whose leads you want to view.

Note: This drop-down list is only available if you are subscribed to a team or partnership version.

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3. If many leads are listed, click **Expand** to view more leads. Click **Collapse** to return to the previous view.

4. Click the lead's name to display their details below in the **Contacts** section.

5. Double-click the lead's name to view their contact record. For more information, see *"Viewing And Modifying Contacts" on page 132*.

6. Click **Go to Lead manager** to display the Lead manager.

7. Click the **View / Edit** icon () adjacent to a lead to modify it. For more information, see *"Viewing And Modifying Contacts" on page 132*.

8. Click the **Create presentation** icon () adjacent to a lead to create a CMA, Home Market Report, Buyer presentation or Community Report.

Tip: If the lead does not have address information entered in their record, double-click the lead's name to enter address details.

9. Click the **Apply action plan** icon () adjacent to a lead to apply an action plan.

   - From the **Available plans** list, select the plan you want to apply, and then click **Add**.
   - From the **Start date** field on the *Select plan start date* dialog box, type the start date of the plan or click the calendar icon to select a date.
   - From the *Select plan start date* dialog box, click **OK**.
   - From the *Apply action plan* dialog box, click **OK**.

10. If the lead's email address is displayed in the **Contact info** column, click it to send an email to that lead. For more information, see *"Composing And Sending Email" on page 352*.

Working with Contacts from the Dashboard

The Contacts section displays your contacts in a convenient Rolodex format. You can search for and display a contact, view and manage your favorites list, scroll through multiple contacts, quickly send an email, and more.

To work with contacts from the Dashboard:

1. To open the Dashboard, from the main menu, click **Home**.

2. Click a letter to display contacts whose last name begins with that letter.

3. If a list of your contacts is displayed, click **Quick view** to display additional details about a contact (for example, their address, contact information and contact type). You can do the following from the Quick view:

   - Click **Show / Add notes** to view or add contact notes.
   - Click **Add to favorites** to add the displayed contact to your favorites list.

     The favorites list makes those contacts you deal with easily accessible.
   - Use the **Previous** ( ) and **Next** ( ) arrows to switch between contacts. This can be a useful tool when cold calling.
   - Click **Close** to return to the list view.

4. Click **Full view** adjacent to a contact's name to display their contact record. For more information, see *"Viewing And Modifying Contacts" on page 132*.

5. In the text box on the right side of the **Contacts** section, search for a contact by entering the contact's last name, phone number or email address. Click the **Start search** icon ( ).

6. Click the **Favorites** icon to display all contacts that you have added to your favorites list.

7. If the contact's email address is displayed in the **Contact at** column, click it to send an email to that contact. For more information, see *"Composing And Sending Email" on page 352*.

Adding Contacts and Activities from the Dashboard

You can quickly add:

- a contact (see below).
- an activity (i.e., an appointment, call or to-do activity). See *page 120*.

To add a contact:

Note: Top Producer 7i will not check for duplicate contacts when a contact is entered from the Dashboard. If you need to determine if a contact already exists, search or look for the contact in the **Contacts** section. For more information, see *"Working with Contacts from the Dashboard" on page 117*.

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1. To open the Dashboard, from the main menu, click **Home**.
2. In the **Quick Entry** section, click the **Contact** tab.
3. Enter the contact's first and last name.
4. In the **Contact info** section, complete the following:
   - From the drop-down list, select the type of contact information you want to enter (for example, home phone number or email address).
   - In the text field below, enter the primary method of contact (either a phone number or email address).
5. From the **Source** field, select the origin of the contact.

Tip: Entering a source (for example, your web page) will help you determine where new business is coming from. If you enter a source, the contact will be marked as a lead and will appear in the Lead manager, ready for follow up. If you enter "TP IDX" (Top Producer IDX), you will automatically have the TP IDX Dashboard link added to the action menu. When clicked, this link will take you to the Top Producer IDX login page or directly to the dashboard (only if you are subscribed to Top Producer Websites).

6. In the **Note** section, enter any comments or details about the contact.

7. Click **Save**.

To add an activity:

You can add an appointment, call or to-do activity.

1. To open the Dashboard, from the main menu, click **Home**.

2. In the **Quick Entry** section, click the **Activity** tab.

3. From the **Type** drop-down list, select whether you are adding an **Appointment**, **Call** or **To-do**.

4. Enter the activity's **Description**.

5. Select the activity's **Date**.

Note: If you are creating a to-do activity, skip to step 7.

6. Enter the activity's **Start time** and **End time**.

7. Click **Save**.

Managing Contacts

In this chapter:

Creating Contacts

One of Top Producer 7i's most powerful features is the ability to enter and store data on the contacts involved in your business.

You can enter detailed information into a contact record, including:

Assign one or more detailed contact types to each contact to enable you to perform more effective searches and more precise target prospecting and marketing.

- **Contact types** — a further way of classifying and organizing contact records, and a searchable criterion that can be user-defined.
- **Name and address information** — the contact's residence and business address, first name, last name, salutation, and partner name.
- **Contact information** — the contact's home phone, business phone, fax number, and email address. You can enter an unlimited amount of contact information for any contact you enter in Top Producer 7i.

Checking for duplicate contacts

Top Producer 7i has a duplicate contact record feature that searches your contacts for duplicate names, home and business phone numbers, and email addresses. The feature checks for an exact match in the following scenarios:

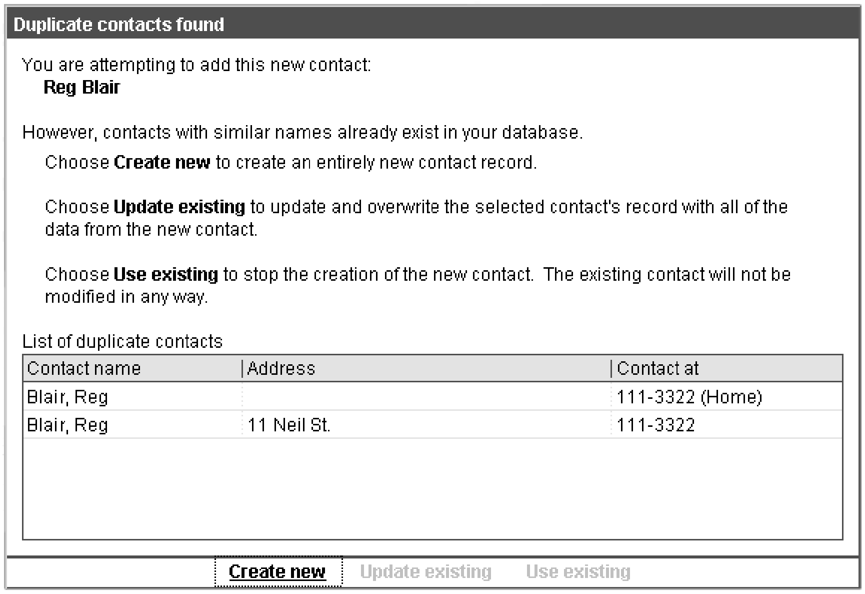
- the contact's primary first and last name (regardless of contact information) is the same
- the contact's secondary first and last name (regardless of contact information) is the same
- a company name (if no other name details are entered) is the same

When enabled from the *Preferences* page (see *"Specifying user settings" on page 103*), the feature checks for duplicate records:

- when you add and save (by clicking **OK**) a new contact record that you entered manually.

Finding a duplicate contact record

If Top Producer 7i finds a duplicate contact record during one of the scenarios listed previously, the *Duplicate contact found* pop-up window opens.



1. Highlight a record in the **List of duplicate contacts** section of the pop-up window.

2. You will be asked to perform one of the following actions, based on your selection:

   - **Create new** — Click this button to create a new contact record. The existing record will remain untouched. If you choose this option, you may be creating a duplicate contact record.
   - **Update existing** — Click this button to overwrite certain existing field information and merge new data into the existing selected record. The information entered in the new contact record will overwrite the information in the existing contact record.
   - **Use existing** — Click this button to save the existing selected contact record, as is, without modification. The duplicate contact record (along with its linked listings, closings, referrals, flyers, and presentations) will NOT be saved.

Note: The listings, closings, flyers, presentations, mailouts, and emails, etc. will be kept for existing contact records.

For more information on the Duplicate record check feature as it applies to leads, see *“Checking for duplicate contacts” on page 122*.

About hidden contacts

A hidden contact is created when you choose NOT to show a new contact record in the Address book. For example when creating a closing, you can choose the option to create a new contact record, but not show it in your Address book.

This current functionality creates a couple of unique situations:

- when you send an email to a hidden contact through the **View contact** link off the **Closing parties** tab of a current closing, the message will NOT be linked to the hidden contact record. Rather a new “dummy” contact record will be created that has no first or last name. This is necessary in order to track that the email was actually sent, as checking the contact’s transaction history (click **View history** from the action menu) will not show this event ever took place.
- you may see multiple contact records with the same email address in your database.

For more information, see *“Linking email to contacts and viewing an email correspondence history” on page 347*.

Creating a contact record

There are two ways to add a contact record:

- **Quick contact entry** — enter a contact's details quickly. Most action menu items aren't available if you choose this option, and only the main fields appear.
- **Detailed contact entry** — enter detailed information about a contact. All action menu items are available if you want to perform a task immediately after entering the contact (for example, apply a plan).

Note: If you have selected the option on the *Preferences* page (see *page 103*) to allow multi-tasking in Top Producer 7i, you can quickly add a new contact while performing another task. For more information, see *“Creating a contact record while performing another task” on page 126* and *“Setting the ability to multitask in Top Producer 7i” on page 104*.

To create a contact record:

1. To:

- quickly add a contact, point to **Contacts**, and then click **Quick contact entry**.
- add detailed information about a contact, point to **Contacts**, and then click **Detailed contact entry**.

Note: If you chose **Quick contact entry**, only certain fields will be available. For additional fields, click the **Name details**, **Contact information**, and **Address details** links.

2. Enter name, address and contact information:

   - to specify detailed name information, click the **Name details** link. On the *Name details for [contact name]* page, enter information about the names of the primary and secondary contact persons. Click **OK** to return to the *[Quick/Detailed] contact entry - Add new contact* page. For more information on entering name details, see *"Modifying name details" on page 134*.
   - to enter detailed contact information, click the **Contact information** link. Fill in the fields on the *Contact information for [contact name]* page. Click **OK** to return to the *[Quick/Detailed] contact entry - Add new contact* page. To specify what type of contact information (for example, email address or home phone number) to display on the *Search results* page, select an option from the **Show in list** drop-down list. The information appears in the **Contact at** column on the *Search results* page. For more information on performing a search, see *"Searching For Contacts" on page 175*.
   - to enter detailed address information, click the **Address details** link. Fill in the fields on the *Address details for [contact name]* page, then click **OK** to return to the *[Quick/Detailed] contact entry - Add new contact* page.

Note: The **Direction prefix** drop-down list lets you select whether a direction appears **before** a street name, such as W 29. If the direction appears **after** the street name, such as 29 W, use the **Direction suffix** drop-down list instead.

3. Enter the contact type (for example, investor or listing prospect) in the **Contact types** field. Either type the contact type directly in the text box, or click the list icon to select a preset item.

4. Click **OK** once you've entered the contact's information; or click **Enter next** to add another contact.

   If an existing contact in your database matches the contact's information you have just entered, the *Duplicate contact found* pop-up window opens.

> **Note:** The duplicate contact check will only appear IF you have the option selected in the **General preferences** section, (see *"Setting General Preferences" on page 102*).

5. To:

   - create a new contact record, click **Create new**.
     A new contact record will be created and the existing record will remain untouched. If you choose this option, you may be creating a duplicate contact record.
   - overwrite the information in the existing record with the information from the new record, click **Update existing**.
     The information entered in the new contact record will overwrite the information in the existing contact record.
   - keep the existing contact's information and disregard the information you entered in the new contact record, click **Use existing**.
     The existing contact's information will remain the same, and ALL the data you entered into the new record will NOT be saved.

Creating a contact record while performing another task

If you have selected the option on the Preferences page (see *page 103*) to allow multitasking in Top Producer 7i, you can quickly add a new contact while performing another task. This can be very useful if, for example, you are typing a letter and a lead calls you for information on a property. Instead of saving and closing the letter to add the lead's information to your database, you can quickly add their details in a separate window. Your letter will remain open until you can resume working on it.

Note: The **Quick contact entry** icon will only appear if you selected the **Show quick access icon toolbar** option on the *Preferences* page (see *page 103*).

1. Click the **Quick contact entry** icon on the right side of the main menu bar.

   The *Quick contact entry - Add new contact* page opens in a separate window. The page you were previously working on remains open and can be accessed via the **Main page** tab along the bottom of the page.

2. Enter the contact's details in the appropriate fields. For additional fields, click the **Name details**, **Contact information**, and **Address details** links. For more information on entering contact information, see *page 125*.

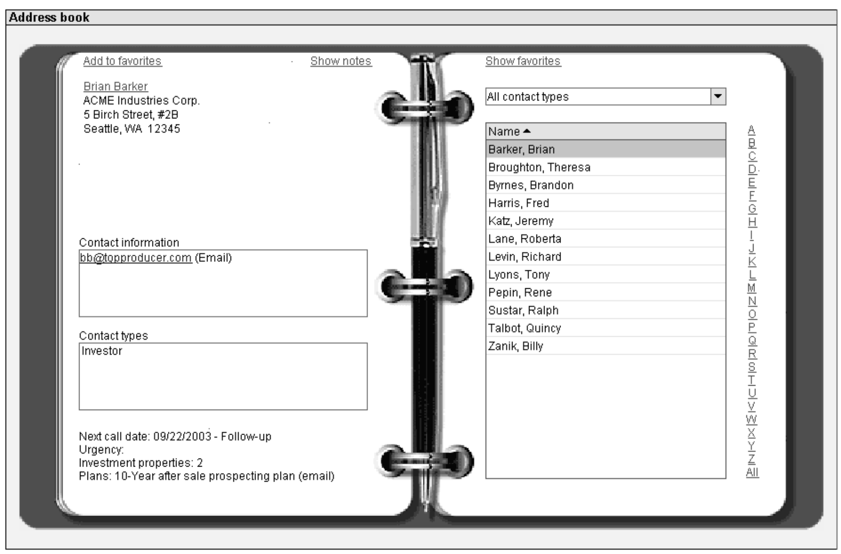
3. Click **OK** to save the contact.

The Address Book

The Address book provides you with a quick and easy summary of all your contacts' basic information, including name, contact type, phone numbers, next call date, urgency, action plans, and the number of investment properties.

Use the Address book just like you would use a real address book to find a phone number or to keep a list of favorite contacts (see *page 131*). You can use the Address book to access the contact record where you'll find more detailed information.

You can add or delete contacts, send an email, or create a flyer directly from the Address book. You can even configure the Address book to appear automatically every time you start the program (see *page 102*).



Using the Address book

This section tells you how to work with the various features of the Address Book.

To access the Address Book:

1. Point to **Contacts** and then click **Address book**.

   The *Address book* opens.

2. Use the right page to browse through your contacts by using the alphabet links listed down the right edge, just like a real address book. Click any letter to view contacts whose last name starts with that letter. The selected contact's commonly needed information appears on the left side of the Address book page.

3. Use the scroll bar to the right to scroll through your contacts.

Note: The scroll bar will not be present if all of your contacts can fit on the page at once.

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4. To:

   - see contacts of a specific type, click the drop-down list on the right side of the Address Book and select a contact type.
   - reverse the direction of alphabetic sorting, click the **Name** heading.
   - display a contact's record, click the contact's name link on the left side of the Address Book
     OR
     select the contact and then click **View or edit contact** from the action menu.
     The *Contact details for [contact name]* page opens. For more information on viewing or editing a contact record, see *page 132*.
   - display notes for the selected contact, click the **Show notes** link on the left side of the Address Book.
     The *Notes for [contact name]* pop-up window opens. For more information on managing contact notes, see *page 139*.
   - add a new contact, click **Add new contact** from the action menu.
     For more information on adding a contact, see *page 124*.
   - send an email to the selected contact, click **Send email** from the action menu.
     The *New email message* page opens. For more information on composing and sending an email, see *page 352*.
   - create a flyer for the selected contact, click **Create flyer** from the action menu.
     The *Create flyer* page opens. For more information on creating a flyer, see *page 379*.

- send a flyer to the selected contact, click **Send flyer** from the action menu.
  The *Send flyer* page opens. For more information on sending a flyer, see *page 385*.
- create a presentation for the selected contact, click **Create presentation** from the action menu.
  The *Create CMA - Select template* page opens. For more information on creating a presentation, see *page 410*.
- send mail to the selected contact, click **Perform mail out** from the action menu.
  The *Perform mail out - select template* page opens. For more information on performing a mail-out, see *page 337*.
- view or print a report for the selected contact, click **View report** from the action menu.
  The *Report options* page opens. Select the report information you want to view by choosing the appropriate option button, and then click **View report** from the control menu.
  The Top Producer 7i *Report -- [report type]* page opens.
  To print the report, click the **Print** icon at the top of the page. For more information about how to work with this page, including the toolbar icons, see *"Viewing And Printing Reports" on page 588*.
  The *Print* pop-up window opens. Specify your print settings, then click **OK**.
- to view or modify a referral that is linked to the selected contact, click **View or edit referral** from the action menu.
  The *Referral details* page opens. For more information on modifying a referral record, see *page 228*.
- to create a referral record for the selected contact, click **Create referral** from the action menu.
  The *New referral* page opens. For more information on creating a referral record, see *page 220*.
- delete a selected contact, click **Delete contact** from the action menu.
  When the *Delete contact* dialog box opens, click **Yes**.
  The contact is removed from the Address Book and your database.

5. Click **Close**.

Managing your favorites list

You can create an unlimited list of favorite contacts, for example those contacts whom you call the most. This section tells you how to view the contacts in this list, add contacts or remove contacts from your favorites list.

To mark favorite contacts:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - add a contact to your favorites list, select the contact in the Address book so that the name is highlighted, and then click the **Add to favorites** link in the top left of the Address book page.
   - view your list of favorites, click **Show favorites** at the top right of the Address book page. Click **Show all contacts** to return to the previous view.
   - remove favorite status from a contact, highlight the favorite contact in the Address book or from the favorites page, then click the **Remove from favorites** link at the top left of the page.

3. Click **Close** to return to the main menu.

Viewing And Modifying Contacts

Viewing a contact record

This section tells you how to view contact records.

Note: If you have selected the option on the *Preferences* page (see *page 103*) to allow multitasking in Top Producer 7i, you can search for and display a contact's information while performing another task. For more information, see *"Looking up a quick contact list while performing another task" on page 132* and *"Setting the ability to multitask in Top Producer 7i" on page 104*.

To view a contact record:

1. Point to **Contacts** and then click **Address book**.
2. To:
   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.
3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

Looking up a quick contact list while performing another task

If you have selected the option on the Preferences page (see *page 103*) to allow multitasking in Top Producer 7i, you can search for and display a contact's information while performing another task. This can be very useful if, for example, you are typing an email and need to look up a contact's email address. Instead of saving and closing your email to look it up, you can display the contact's details in a separate window. Your email will remain open until you can resume working on it.

Note: The **Quick contact list** icon will only appear if you selected the **Show quick access icon toolbar** option on the *Preferences* page (see page 103).

1. Click the **Quick contact list** icon on the right side of the main menu bar.

   The *Quick contact list* page opens in a separate window. The page you were previously working on remains open and can be accessed via the **Main page** tab along the bottom of the page.

2. Search for a specific contact by selecting the option button next to the type of criterion you want to search for. Enter your search criteria in the appropriate fields, and then click **Start search**.

   Contacts matching the search criteria appear in the grid below.

3. You can view more of a contact's details by double-clicking the contact's name, or by selecting the contact and then clicking **View contact** from the action menu.

   The *[Contact name]* pop-up window appears, displaying contact information, property and email addresses, next call date, and assigned contact types.

4. Add a contact quickly by clicking **Add new contact** from the action menu. The *Quick contact entry - Add new contact* page opens. Enter the contact's information, and then click **OK** from the control menu. For more information on entering contact information, see page 125.

5. To close the *Quick contact list* page, click **Close** from the control menu.

Modifying a contact record

Use the **Contact** tab on the *Contact details* page to enter their birthday, contact and property details, information about their family or friends, property information and much more.

If you are part of a team or partnership account, the top right of the contact's record displays the agent that is assigned to the contact.

You can do the following from the contact record:

- modify a contact's name details (see *page 134*).
- modify contact information (see *page 136*).
- modify the contact types that are applied to a contact (see *page 137*).
- modify address details (see *page 138*).
- manage a contact's multiple properties (see *page 148*).
- set up appointments and calls and apply action plans for a contact from their contact record (see *page 138*).
- specify how you heard about the contact and assign a level of urgency in relation to your other contacts (see *page 138*).
- add, modify and delete notes associated with a contact (see *page 139*).
- view customer web page logon information (see *page 140*).

To modify a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

Modifying name details

1. On the **Contact** tab of the *Contact details for [contact name]* page, click the underlined contact's name.

   The *Name details for [contact name]* page opens.

2. In the **Primary person** and **Secondary person** sections, specify the contact's name details.
   To:

   - include the contact's company name on any outgoing mail, enter the name in the **Company name** field, and then select the **On mail** check box.

Note: This feature works in conjunction with mailing templates and merge codes. For example, if you select the **On mail** check box, the company name will only appear on letters or envelopes if the mail template has a company name merge code. See *"Performing A Mail Out" on page 337*.

   - specify a different **Letter Salutation**, click the list icon and select another option; or type one in the field.
   - specify a different **Envelope / label salutation**, click the list icon and select another option; or type one in the field.
   - specify the contact's birth date and include a reminder in Today's business, type the date in the **Birthday** text box or click the calendar icon. If you want to be reminded a certain numbers of days in advance, select the **Remind me** check box, and then type the number of days in the adjacent field or use the spin buttons.
     The birthday reminder will appear under the **To-dos** section in Today's business on the date you specified. For more information on working with Today's business, see *page 256*.
   - include information about the contact's family or friends, under the **Family and friends** tab, click **Add new**. The *Add family or friend* pop-up window opens. Specify the person's information, including their relation to the primary contact and whether the individual lives with the primary contact, and then click **OK**.

     To modify a family or friend's information, select the contact's name and then click **Edit**. The *Edit family or friend* pop-up window opens. Modify the details and then click **OK**.

     To remove a family or friend from the contact's record, select the contact and then click **Delete**. When the *Delete family or friend* dialog box opens, click **Yes**.

- include information about the contact's assistant(s), under the **Assistants** tab, click **Add new**. The *Add assistant* pop-up window opens. Specify the assistant's information, and then click **OK**.

  To modify an assistant's information, select the assistant and then click **Edit**. The *Edit assistant* pop-up window opens. Modify the details and then click **OK**.

  To remove an assistant from the contact's record, select the assistant and then click **Delete**. When the *Delete assistant* dialog box opens, click **Yes**.

3. Click **OK** to return to the *Contact details for [contact name]* page.

Modifying contact information

1. On the **Contact** tab of the *Contact details for [contact name]* page, click the **Contact information** link to edit additional contact information, such as email addresses and phone numbers.

   The *Contact information for [contact name]* page opens.

2. Modify the necessary fields.

   To specify what type of contact information (for example, email address or home phone number) to display on the *Search results* page, select an option from the **Show in list** drop-down list. The information appears in the **Contact at** column on the *Search results* page. For more information on performing a search, see *"Searching For Contacts" on page 175*.

3. Under **Email status,** select:

   - **Subscribed:** When you perform a mail out or when you send a mass email, flyer, or other email messages, this contact will be included in the list of recipients. However, when you change this contact's status to Subscribed, you are prompted to confirm that changing this contact's email status will not violate the laws regulating SPAM.
   - **Unsubscribed:** When you perform a mail out or when you send a mass email, flyer, or other email messages, this contact will be identified as an Unsubscribed contact and will be removed from the list of recipients. For most email activities, you

have the option to add this contact back to the list of recipients.

4. To specify additional phone numbers, email and Internet addresses, click the **Other contact information** tab.
   To:

   - enter additional phone numbers, click **Add new** under the **Other phone numbers** section. The *Add phone number* pop-up window opens. Modify the information, then click **OK**.
   - edit a phone number, highlight the number you want to modify, then click **Edit** under the **Other phone numbers** section. The *Edit phone number* pop-up window opens. Modify the information, then click **OK**.
   - delete a phone number, highlight the number you want to delete, then click **Delete** under the **Other phone numbers** section. When the *Delete phone number* dialog box opens, click **Yes**.
   - enter additional email and web site addresses, click **Add new** under the **Other email and web addresses** section. The *Add email or web address* pop-up window opens. Enter the required information, then click **OK**.
   - edit an email or web site address, highlight the address you want to change, then click **Edit** under the **Other email and web addresses** section. The *Edit email or web address* pop-up window opens. Modify the information, then click **OK**.
   - delete an email or web site address, highlight the address you want to remove, then click **Delete** under the **Other email and web addresses** section. When the *Delete [address type]* dialog box opens, click **Yes**.

5. Click **OK** to return to the *Contact details for [contact name]* page.

6. To add or remove contact types associated with the displayed record, click the **Contact types** link located in the top right of the *Contact details for [contact name]* page. The *Contact types* pop-up window opens. Apply or remove a contact type by clicking it. Click **OK**. For more information on working with pick lists, see *“List Icons” on page 23*.

Modifying address details

1. From the *Contact details for [contact name]* page, click the **Address details** tab to edit address information.

2. Modify the necessary fields by typing in the appropriate fields, or using the drop-down lists and list icons.

Note: The **Direction prefix** drop-down list lets you select whether a direction appears **before** a street name, such as W 29. If the direction appears **after** the street name, such as 29 W, use the **Direction suffix** drop-down list instead.

3. Click the **Contact** tab.

4. To:

   - manage the displayed contact's multiple properties, click the **Properties** link. For more information on managing a contact's multiple properties, see *page 148*.
   - set up a call for the displayed contact, click **Next call date**. The *Add new call* page opens. Enter the call details and then click **Finish**. For more information on entering a call activity, see *page 162*.
   - modify call details (if a call has already been set up for the displayed contact), click **Next call date**. The *View or edit call for [contact name]* page opens. Modify the call details, and then click **OK**. For more information on modifying a call's details, see *page 266*.
   - set up an appointment for the displayed contact, click the **Appointments** link. The *Add new appointment* page opens. Enter the appointment details, and then click **Finish**. For more information on entering an appointment, see *page 259.*
   - modify appointment details (if an appointment has already been set up for the displayed contact), click the **Appointments** link. The *View or edit appointment for [contact name]* page opens. Modify the appointment details and then click **OK**. For more information on modifying an appointment's details see *page 266.*

To remove an applied plan, select the plan from the **Current plans** grid and then click **Remove.** The plan moves to the **Available plans** grid.

- apply an action plan to a contact record, click the **Action plan** link. The *Action plan for [contact name]* page opens. Click **Select plan** from the action menu. The *Apply action plan* pop-up window opens. Select the plan you want to apply from the **Available plans** grid, and then click the **Add** arrow. The plan moves to the **Current plans** grid. Click **OK**.
- specify how the contact heard about you (for example an ad or a lawn sign), type in the **Source** field.

  Setting the source will mark the contact as a lead, enabling you to view it from the Lead manager. For more information about the Lead manager, see *page 186*. If you selected "TP IDX" (Top Producer IDX), you will automatically have the TP IDX Dashboard link added to the action menu. When clicked, this link will take you to the Top Producer IDX login page or directly to the dashboard (only if you are subscribed to Top Producer Websites).
- If the contact is the result of a lead, the **Inquiry form** field will be available.

Note: The form you selected in the **Inquiry form** field will NOT be saved UNLESS you have also specified the origin of the contact in the **Source** field.

- specify a number to rate this contact's priority in relation to your other active contacts, type in the **Urgency** field or click the list icon to select a preset item.

Managing notes from the contact record

1. Click the **Contact notes** or (**Listing notes** or **Closing notes**) tabs to view notes associated with the displayed contact.

2. To:

   - add a note, click **Add new**. A new note box will appear in the list, with the cursor at the beginning ready for you to type the new note. Type your note, or click the **Pick from list** link to select a phrase from the pick list.
   - print a list of the displayed notes, click **Print notes**. The Top Producer 7i *Report — Print Notes* page opens. Click the **Print** icon at the top of the

page. For more information about how to work with this page, including the toolbar icons, see *"Viewing And Printing Reports" on page 588*. The *Print* pop-up window is displayed. Specify your print settings, then click **OK**.

- view your notes, use the scroll bar located to the right of the **Notes** box.
- view an additional 10 notes, click the **View 10 more** link. Use the scroll bar to view the notes.

Note: When the contact record is displayed, only the last ten notes entered will be shown.

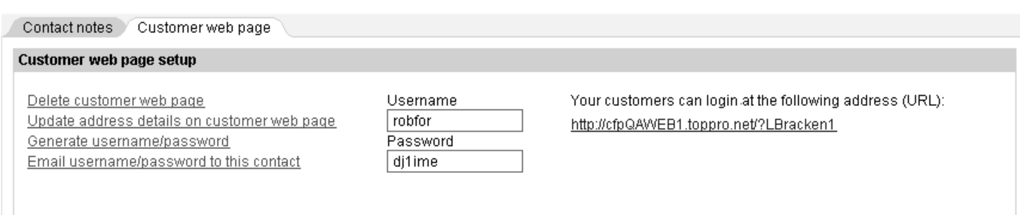
- view all the notes for the specified record, click the **View all** link. An hourglass will be displayed while the notes are being downloaded. Once complete, use the scroll bar to view the additional notes.

Viewing login information for customer web pages

If any changes are made to listing or closing addresses on the property, you can update the customer web page for the selected contact.

1. Click the **Customer web page** tab to view the customer web page setup information for the selected contact.

Note: You must have already created a customer web page, before you can update it or email the username and password information, (see *"Creating a customer web page" on page 62*).



2. View the **Username** and **Password** information, along with the URL to the customer web page.

Entering Property Statistics For A Contact

This section tells you how to enter property statistics for a contact.

To enter a contact's property statistics:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Property statistics** tab.

5. In the **Address: [property address]** section, specify details about the contact's property.

   - in the **Taxes** field, type the dollar amount of property tax that was paid in the last tax year.
   - in the **Tax year** field, type the year that the property taxes were last paid.
   - in the **Tax assessment** field, type the total value of the land assessment and building improvements. This value is determined by the tax assessment department.

The fields considered "self explanatory" are not described herein. See the online Help for more descriptions.

- select the **Attached** check box if the property is attached to another property (for example, a condominium or a townhouse).

6. In the **Room dimensions** section, located in the bottom left of the page, specify the size of the property's various rooms.

7. In the **Additional rooms** section, add, edit, or delete information for any extra rooms.
   To:

   - add an additional room click **Add**.
     The *Add additional room* pop-up window opens.
     Enter the **Description**, **Length** and **Width** of the room, then click **OK**.

Note: The **Description** and **Length** fields are required fields.

   - modify a room's details, select the room, then click **View or edit**.
     The *View or edit additional room* pop-up window opens.
     Make any necessary modifications, then click **OK**.
   - delete a room, select the room, then click **Delete**.
     When the *Delete additional room* dialog box opens, click **Yes**.

8. In the **Features and amenities** section, complete the following for any additional features:

   - **Room** — Enter one or more types of rooms (i.e. Eat-in kitchen, Screen room), or click the list icon to select a preset item.
   - **Features** — Enter one or more features (i.e. Sauna, Pool), or click the list icon to select a preset item.
   - **Site / view** — Enter one or more view descriptions for the property (i.e. Ocean view), or click the list icon to select a preset item.

9. Click another tab to continue working with the contact record; or click **Close** once you've completed entering the property statistics.

Adding Pictures To A Contact Record

This section tells you how to add pictures of a property, person, or map directions to a contact record. Pictures must be in Joint Photographic Experts Group (.JPG or .JPEG) format.

To insert images into a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Pictures** tab.

5. To add a picture:

   - specify the type of picture you want to add from the **Picture** drop-down list.
   - select the **Display picture** check box to view the picture being added.

To remove a picture, select the picture type from the **Picture** drop-down list. Select the picture you want to remove by using the **<<Previous** and **Next>>** links, and then click **Remove.** When the *Remove picture* dialog box opens, click **Yes.**

- click **Add**. The *Select picture* pop-up window opens. Click the **Look in** drop-down list to select where the file is saved. Find and select the graphic file you want to attach, then click **Open**.
- choose a merge code that will represent this picture from the **Merge code** drop-down list. For example, if you are adding a picture of the front of the property, choose the **view_front** merge code from the **Merge code** drop-down list.

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

6. Click another tab to continue working with the contact record; or click **Close** once you've completed entering pictures.

Adding Information About A Contact's Present And Future Home

You can add present home information for a contact, as well as information for the type of house details the contact(s) may be looking for in the future.

To enter present and future home information:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Present/future home** tab.

5. In the **Present home: [property address]** and **Future home** sections, specify:

   - the minimum and maximum prices for the properties in the **Minimum price** and **Maximum price** fields.
   - the house style in the **House style** fields, or click the list icon to select a preset item.

- the square footage of the properties in the **Square feet** fields.
- the number of bedrooms and bathrooms the properties have in the **Bedrooms** and **Bathrooms** fields.
- the location of the properties in the **Area** fields, or click the list icon to select the preset item.
- the distance from the property to the nearest school in the **Distance to school** fields, or click the list icon to select a preset item.
- any features, such as a hot tub or sauna, that the properties may have in the **Features** fields, or click the list icon to select a preset item.
- the property ID for the present property in the **Property ID** field.

Note: The **Property ID** field is only available in the **Present home: [property address]** section.

- the type of parking available for the properties, such as underground parking or a two car garage, in the **Parking** fields, or click the list icon to select a preset item.
- any other items the property may have, such as a built-in vacuum or a playground, in the **Other items** fields, or click the list icon to select a preset item.

6. In the **Present home notes** and **Future home notes** sections, view any additional notes about the properties.
   To:

   - add a note, click **Add new**. A new note box will appear in the list, with the cursor at the beginning ready for you to type the new note. Type your note, or click the **Pick from list** link to select a phrase from the pick list.
   - print a list of the displayed notes, click **Print notes**. The Top Producer 7i *Report -- Print Notes* page opens. Click the **Print** icon at the top of the page. For more information about how to work with this page, including the toolbar icons, see *"Viewing And Printing Reports" on page 588*. The *Print* pop-up window opens. Specify your print settings, then click **OK**.
   - view your notes, use the scroll bar located to the right of the **Notes** box.

- view an additional 10 notes, click the **View 10 more** link. Use the scroll bar to view the notes.

Note: When the contact record is displayed, only the last ten notes entered will be shown.

- view all the notes for the specified record, click the **View all** link. An hourglass will be displayed while the notes are being downloaded. Once complete, use the scroll bar to view the additional notes.

7. Click another tab to continue working with the contact record; or click **Close** once you've completed entering the present and future home information.

Managing A Contact's Multiple Properties

If a contact owns more than one property, use the *Property summary* page to enter additional property information. To manage a contact's multiple properties, you can:

- add additional properties (see *page 148*).
- modify additional property information (see *page 151*).
- delete an additional property (see *page 152*).
- set a primary property (see *page 153*).
- set whether mail will be sent to a particular property (see *page 154*).
- add tenant information (see *page 155*).
- modify tenant information (see *page 156*).
- delete tenant information (see *page 157*).

Adding an additional property to a contact record

This section tells you how to add an additional property to a contact record.

To add a property to a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. Click **Add property** from the action menu.

   The *Add new property* page opens.

6. Specify:

   - the property type (**Investment**, **Primary** or **Other**) from the **Property type** drop-down list.
   - the property's address details by typing in the appropriate fields.

Note: The **Direction prefix** drop-down list lets you select whether a direction appears **before** a street name, such as W 29. If the direction appears **after** the street name, such as 29 W, use the **Direction suffix** drop-down list instead.

   - whether you want this property to be a mailing address for the contact by selecting the **Make this a mailing address** check box.

7. In the **Property notes** section, add any additional notes about the properties.
   To:

   - add a note, click **Add new**. A new note box will appear in the list, with the cursor at the beginning ready for you to type the new note. Type your note, or click the **Pick from list** link to select a phrase from the pick list.
   - print a list of the displayed notes, click **Print notes**. The Top Producer 7i *Report -- Print Notes* page opens. Click the **Print** icon at the top of the page. For more information about how to work with this page, including the toolbar icons, see *"Viewing And Printing Reports" on page 588*. The *Print* pop-up window opens. Specify your print settings, then click **OK**.
   - view your notes, use the scroll bar located to the right of the **Notes** box.
   - view an additional 10 notes, click the **View 10 more** link. Use the scroll bar to view the notes.

Note: When the contact record is displayed, only the last ten notes entered will be shown.

- view all the notes for the specified record, click the **View all** link. An hourglass will be displayed while the notes are being downloaded. Once complete, use the scroll bar to view the additional notes.

8. Click **Next** to enter the property's statistics.

   The second page of the *Add new property* wizard opens.

9. Enter as much information as you can about the property's statistics.

Note: For more information on entering property statistics, see *page 141*.

10. Click **Next**.

    The third page of the *Add new property* wizard opens.

11. To add a picture:

    - specify the type of picture you want to add from the **Picture** drop-down list.
    - select the **Display picture** check box to view the picture being added.
    - click **Add**. The *Select picture* pop-up window opens. Click the **Look in** drop-down list to select where the file is saved. Find and select the graphic file you want to attach, then click **Open**.
    - choose a merge code that will represent this picture from the **Merge code** drop-down list. For example, if you are adding a picture of the front of the property, choose the **view_front** merge code from the **Merge code** drop-down list.

To remove a picture, select the picture type from the **Picture** drop-down list. Select the picture you want to remove by using the **<<Previous** and **Next>>** links, and then click **Remove.** When the *Remove picture* dialog box opens, click **Yes.**

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

12. Click **Finish**.

    The *Property summary* page opens, displaying the new property you just added.

Modifying additional property information

This sections tells you how to view and/or modify an additional property's information.

To modify an additional property:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. Select the property you want to modify and then click **View or edit property** from the action menu.

   The *[Property type] property details for [Contact name]* page opens.

6. Modify the property's address details by typing in the appropriate fields. To specify whether you want this property to be a mailing address for the contact by selecting the **Make this a mailing address** check box.

   Note: The **Direction prefix** drop-down list lets you select whether a direction appears **before** a street name, such as W 29. If the direction appears **after** the street name, such as 29 W, use the **Direction suffix** drop-down list instead.

7. Modify notes associated with the property in the **Property notes** section.

Note: For more information on working with the notes section, see *page 149*.

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8. Click the **Property statistics** tab to modify a property's statistical details.

Note: For more information on modifying a property's statistics, see *page 141*.

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9. Click the **Pictures** tab to view, add or delete pictures associated with the property.

Note: For more information on working with a property's pictures, see *page 150*.

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10. Click **Close**.

Deleting a property

This section tells you how to delete a property.

To delete a property:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. Select the property you want to delete and then click **Delete property** from the action menu.

   The *Delete property* dialog box opens.

6. Click **Yes**.

   The property is removed from the *Property summary* page.

   If you are deleting the primary property, the *Select new primary* pop-up window opens. Select a new primary property from the drop-down list, and then click **OK**. The property you selected to delete is removed from the *Property summary* page, and the word **Primary** will appear in the **Property type** column beside the new primary property.

Setting a primary property

This section tells you how to set a primary property for a contact.

To set a primary property:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. Select the property you want to set as primary and then click **Set primary property** from the action menu.

The *Change original primary property* pop-up window opens, displaying the original primary property.

6. From the drop-down list, select a new property type, and then click **OK**.

   The **Property type** column is updated.

Setting whether mail will go to a property

When you add an additional property, you select whether mail for a contact would go to this property. For more information, see *"Adding an additional property to a contact record" on page 148*.

This section tells you how to change whether mail will be sent to a particular address.

To set whether mail goes to a particular property:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. To:

   - prevent mail from going to a particular address, select the property and then click **Unmark as mailing address** from the action menu.

     The word **No** appears in the **Mail** column, indicating that mail will no longer be sent to this address.

- send mail to a particular address, select the address and then click **Mark as mailing address** from the action menu.

The word **Yes** appears in the **Mail** column, indicating that mail will be sent to this address.

6. Click **Close**.

Adding tenant information for a property

You can add tenant information for a property that is assigned an **Investment**, **Primary**, or **Other** property type. Only pre-owned properties cannot have tenants.

To add tenant information:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. Select a property from the list and click **View or edit property** from the action menu.

   The *[Property type] property details for [contact name]* page opens.

6. Click **Add tenant information** from the action menu.

   The *Add tenant information* page opens.

7. In the **Primary person** and **Secondary person** sections, specify the contact's name details.

8. In the **Contact information** section, specify the contact information, and a short description if necessary.

9. Click **OK**.

Modifying tenant information

This section tells you how to view or edit a tenant's information.

To modify tenant information:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. Select a property from the list and click **View or edit property** from the action menu.

   The *[Property type] property details for [contact name]* page opens.

6. Click **View or edit tenant information** from the action menu.

   The *View or edit tenant information* page opens.

7. Modify the necessary fields, and then click **OK**.

Deleting tenant information

This section tells you how to remove tenants from a contact's property information.

To delete tenants:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click the **Properties** link under the **Contact** tab.

   The *Property summary* page opens.

5. Select a property from the list and click **View or edit property** from the action menu.

   The *[Property type] property details for [contact name]* page opens.

6. Click **View or edit tenant information** from the action menu.

   The *View or edit tenant information* page opens.

7. Click **Delete** from the action menu.

   The *Delete tenant* dialog box opens.

8. Click **Yes**.

Creating A Flyer From A Contact Record

This section tells you how to create a flyer from the *Contact details for [contact name]* page.

To create a flyer from a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to create a flyer for, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **Create flyer** from the action menu.

   The *Create flyer - Select the flyer you want to create* page opens; or if the contact has multiple properties, the *Create flyer - Select a property* page opens.

Note: For more information on creating a flyer, see *"Creating A New Flyer" on page 379*.

Sending A Flyer From A Contact Record

This section tells you how to send a flyer from the *Contact details for [contact name]* page.

To send a flyer from a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book. All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to send the flyer to, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **Send flyer** from the action menu.

The **Send flyer** action menu item will not be available if an email address has not been entered into the displayed contact's record. For more information on modifying a contact record, see *page 132*.

Note: For more information on sending a flyer, see *"Sending Flyers To Contacts" on page 385*.

Creating A Presentation From A Contact Record

This section tells you how to create a presentation from the *Contact details for [contact name]* page.

To create a presentation from a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to create the presentation for, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **Create presentation** from the action menu.

Note: For more information on creating a presentation, see *"Creating A New Presentation" on page 409*.

Performing A Mail Out From A Contact Record

This section tells you how to perform a mailout from the *Contact details for [contact name]* page.

To send a mailing from a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book. All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to send a mailing to, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **Perform mail out** from the action menu.

   The *Perform mail out - select template* page opens.

Note: For more information on performing a mail out, see *“Performing A Mail Out” on page 337*.

Scheduling A Follow-Up Activity For A Contact

This section tells you how to add an activity for a contact from the *Contact details for [contact name]* page.

To add an activity from a contact record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact record you want to schedule for follow-up activity for, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **Schedule follow-up** from the action menu.

   The *Add new activity* page opens.

Note: For more information on adding an activity, see *"Scheduling An Activity" on page 259*.

Viewing A Contact's History

This section tells you how to view a history of all the activities and correspondence for the contact.

Note: Activities that have been marked done for more than a year are automatically moved to the History Manager. For more information, see *"Reviewing Historical Activities" on page 278*.

To view a contact's history:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact's history you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **View history** from the action menu.

   The *Contact history for [contact name]* page opens.

5. To:

   - view history items of a specific type, select an item from the drop-down list. For example, to view all emails sent to this contact, select **Sent emails** from the drop-down list.

- view a specific history item, select the item and then click **View** from the action menu. For example, to view the details of a specific appointment, select the appointment and then click **View**. The *View [activity type] for [contact name]* page opens.
  View the activity details and then click **Close**.
- view or print a report of the contact history, click **View report** from the action menu. The Top Producer 7i *Report -- Contact history* page opens. Click the **Print** icon at the top of the page. For more information about how to work with this page, including the toolbar icons, see *“Viewing And Printing Reports” on page 588*. The *Print* pop-up window opens. Specify your print settings, then click **OK**.
- delete a history item, select the item and then click **Delete** from the action menu. When the *Delete* dialog box opens, click **Yes**.
- reverse an activity’s “done” status, select the item and then click **Undo mark done** from the action menu. The item will be removed from the *Contact history for [contact name]* page, and the activity will reappear in Today’s business.

6. Click **Close**.

Viewing Transactions Related To A Contact

This sections tells you how to view any transactions a contact is associated with.

To view transactions related to a specific contact:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact whose transactions you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click either **View listings** or **View closings** from the action menu.

   The *Current [transaction type] for [contact name]* page opens.

Note: For more information on working with this page, see *"Working With Listings" on page 454* and *"Viewing Or Editing A Current Closing" on page 520*.

Assigning A Contact To Another Team Member

If you are part of a team or partnership account, you can assign a contact to another team member.

You can also assign a lead or referral to another team member. For more information, see *"Assigning a lead to another team member" on page 212* and *"Assigning a referral to another team member" on page 225*.

To assign a contact to a team member:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact you want to assign, and then click **View or edit contact** from the action menu.

4. From the action menu on the *Contact details* page, click **Assign to agent**.

   The *Select agent* page opens.

5. Select the team member you want to assign the contact to.

6. From the control menu, click **OK**.

   The **Agent** label in the top right of the *Contact details* page will display who the contact is assigned to.

Viewing Or Printing A Contact Summary Report

This sections tells you how to view a summary report of a contact's information.

To view a contact summary report:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **View report** from the action menu.

   The *Report options* page opens.

5. Select the type of report you want to view by choosing the appropriate option button.

6. Click **View report** from the control menu.

   The Top Producer 7i *Report -- [report type]* page opens. Click the **Print** icon at the top of the page. For more information about how to work with this page, including the toolbar icons, see *"Viewing And Printing Reports" on page 588*. The *Print* pop-up window opens. Specify your print settings, then click **OK**.

Viewing Or Creating A Referral From A Contact Record

This section tells you how to view an associated referral from the *Contact details for [contact name]* page. You can also create a referral record from a contact record.

To view or create a referral record:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact you want to view, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. To:

   - view an associated referral record, click **View or edit referral** from the action menu.
     The *Referral details* page opens. For more information on modifying a referral record, see *“Viewing or editing referrals” on page 228*.
   - create a referral that is associated with the displayed contact, click **Create referral** from the action menu. The *New referral - select referral direction* page opens. For more information on creating a referral, see *“Creating a referral” on page 220*.

Deleting A Contact

This section tells you how to delete a contact. Since you can NOT retrieve contact records that have been deleted, make absolutely sure that you no longer need the record **before** deleting it.

When a contact is deleted, all associated properties, activities and active listings and closings are also deleted.

Frozen listings are listings with a status of Cancelled, Withdrawn or Expired. Frozen closings are closings with a status of Fell thru or Closed/Paid Transferred.

However, any frozen listings or frozen closings associated with the contact will remain in the database.

Note: If you are an assistant or are part of a team or partnership account and the **Delete contact** action menu item is unavailable, this indicates the responsible agent has not granted you deletion permissions. Contact the database owner for deletion rights.

To delete a contact:

1. Point to **Contacts** and then click **Address book**.

   The Address book opens.

2. To:

   - see a certain type of contact only, such as buyers, click the drop-down list and specify a contact type. The contact information changes to reflect your settings.
   - search for a contact by the first letter of their last name, click the appropriate letter located to the right of the Address book.
     All contact names beginning with the letter you selected are displayed.

3. Select the contact you want to delete, then click **View or edit contact** from the action menu.

   The *Contact details for [contact name]* page opens.

4. Click **Delete contact** from the action menu.

   The *Delete contact* dialog box opens.

5. Click **Yes**.

   The contact is deleted.

Mass Updating Contacts

The Mass update feature lets you quickly and easily add, remove or change contact information for multiple contacts. Using Mass update, you can modify names, addresses, telephone numbers, contact types, apply action plans, add contact notes, and more, all at the same time.

For example, you could use the Mass update feature to:

- add a custom action plan to all your contacts who live in a certain city
- change the capitalization on all occurrences of a contact type
- if an area code changes, you can change all occurrences of the area code to the new code
- add a city entry to all contacts with a certain area code
- add a contact type of “no email” to all contacts without an “@” in the their email address

Mass update is particularly useful for updating imported contacts, which may be missing certain fields (for example, contact type).

To start a mass update:

1. Point to **Contacts** and click **Mass update**.

   The *Mass update - step 1 of 3* page opens. This page looks and functions exactly the same as the *Advanced search* page. For information on searching for records you want to update, see *“Using Advanced Search” on page 179*.

   Once the search is complete, the matching contacts appear in the *Mass update - step 2 of 3* page. This page looks and functions exactly the same as the *Search results* page.

2. Select the contacts you want to update from the *Mass update - step 2 of 3* and click **Next**.

   The *Mass update data entry - step 3 of 3* page opens. This page contains 5 tabbed sections. The first tab, **Address/phone**, allows you to update address and phone information.

To update address and phone information:

1. The fields in the top of the page are used for modifying address information, (such as **House number**, **Street name**, **City**, **State**, **Zip**, etc.) and **Company name**. Any information entered will replace the current values for all selected contacts. Fields left blank will be unchanged.

2. The fields at the bottom of the page are used for modifying business, fax and area code phone numbers, and must be used in a very particular way:

    - if you enter a value in a **Remove** field and in an **Add/replace with** field, Mass update will replace all occurrences of the former value with the latter, for the selected contacts.
    - if you enter a value in a **Remove** field but not in an **Add/replace with** field, all occurrences of the specified value will be deleted for the selected contacts.
    - if you enter a value in an **Add/replace with** field but not in a **Remove** field, the value will be added to the field, only if it is empty (no data will be overwritten).

To update contact descriptions:

1. Click the **Description** tab to update the **Contact type/Urgency** fields.

2. The **Contact type** and **Urgency** fields are used similarly to the phone number fields in the **Address/phone** tab:

    - if you enter a value in a **Remove** field and in an **Add/replace with** field, Mass update will replace all occurrences of the former value with the latter, for the selected contacts.
    - if you enter a value in a **Remove** field but not in an **Add/replace with** field, all occurrences of the specified value will be deleted for the selected contacts.
    - if you enter a value in an **Add/replace with** field but not in a **Remove** field, the value will be added to the field, only if it is empty (no data will be overwritten).

To update follow up plans and call dates:

1. Click the **Follow-up** tab to update follow-up plans and next call dates.

    - To add action plans, select the plan you want to add from the **Add action plan** drop-down list.
    - To remove action plans, select the plan you want to delete from the **Remove action plan** drop-down list.
    - To add or change the next call date, select the date by clicking the calendar icon adjacent to the **Next call date** field.

To update salutations:

1. Click the **Salutations** tab to update communications salutations.

2. Enter data in the salutation fields you want to update, or select the salutations using the list icon.

    - If you enter a value in a **Remove** field and in an **Add/replace with** field, Mass update will replace all occurrences of the former value with the latter, for the selected contacts.
    - If you enter a value in a **Remove** field but not in an **Add/replace with** field, all occurrences of the specified value will be deleted for the selected contacts.
    - If you enter a value in an **Add/replace with** field but not in a **Remove** field, the value will be added to the field, only if it is empty (no data will be overwritten.

To update notes:

1. Click the **Notes** tab to update contact notes.

2. Enter data in the notes field, or select standard notes using the **Pick from list** link.

    - If you enter a value in a **Remove** field and in an **Add/replace with** field, Mass update will replace all occurrences of the former value with the latter, for the selected contacts.
    - If you enter a value in a **Remove** field but not in an **Add/replace with** field, all occurrences of the specified value will be deleted for the selected contacts.

- If you enter a value in an **Add/replace with** field but not in a **Remove** field, the value will be added to the field, only if it is empty (no data will be over-written.

To perform the update:

1. When you have finished entering update data, click **Start** to perform the mass update.

   - If you have chosen to add an action plan to the contacts, the *Select plan start date* window is displayed. Select the start date for the plan, then click **OK**.
   - If you have chosen to remove an action from the contacts, the *Keep activities history* window is displayed. Click **Yes** to keep activity histories, click **No** to delete the histories.

2. The *Mass update confirmation* dialog box summarizes the updates you have requested. Click **Yes** to proceed with the update.

   The *Updating contacts* message box shows the progress of the update.

3. Click **OK** in the *Mass update* message box.

Searching For Contacts

In this chapter:

Using Quick Search To Find Contacts

Locating and displaying contacts is quick and easy with Top Producer 7i's powerful search engine. You can view a list of all contacts, or use the Quick search feature to perform searches based on the following criteria:

- **Last name**, including the last name of a contact's assistant or family and friend
- **First name**, including the first name of a contact's assistant or family and friend
- **Contact type**
- **Search templates**
- **Street name**
- **City name**
- **State name**
- **Company**
- **Phone numbers**
- **Email address**

Searching for contacts using Quick search

This section tells you how to locate contact records quickly and easily using the Quick Search feature.

To search for contacts using Quick Search:

1. Point to **Search** and then click **Search for contacts**.

   The *Search contacts* page opens.

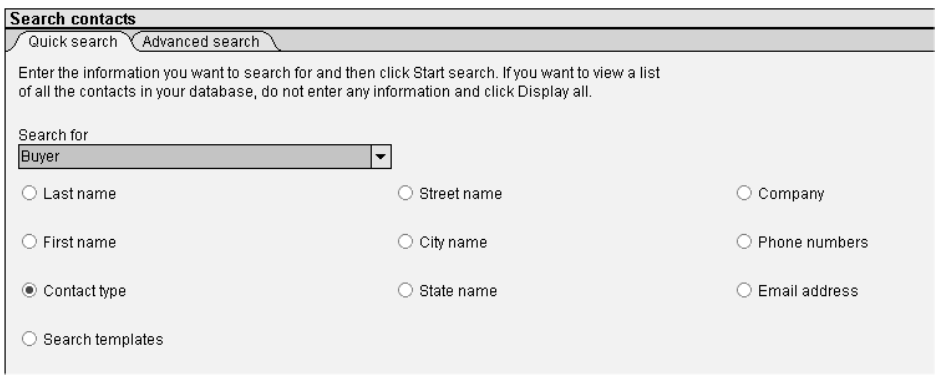
2. Click the **Quick search** tab.

3. Select the type of information you're searching for (for example, **Contact type**) by choosing the appropriate option button.

4. In the **Search for** field, specify the search criteria that matches the type of information you're searching for:

- type a full or partial search criterion in the text box(es) for the **Last name**, **First name**, **Street name**, **Phone numbers**, or **Email address** options. For example, if you selected **Last name**, type the contact's full or partial last name.
- click the drop-down list and select an item for the **Contact type**, **Search templates**, **City name**, or **State name** options.
- click the list icon and select a pre-set item for the **Company** option.

Note: You can search by partial items. (For example, if you select the **Last name** option button, type '**C**' in the **Search for** text box, then click **Start search**, all contacts that have a last name beginning with the letter '**C**' are displayed.



5. Click **Start search** from the control menu.

   The *Search results* page opens, showing you the results of your search.

Note: If you enter search criteria that matches a contact's assistant or family/friend information, the primary contact record will be displayed. For example, you have a primary contact in your database named Jane Smith. This contact has an assistant by the name of Jim Johnson, whose information is entered in Jane's contact record. If you select the **First name** option button, then enter Jim in the **Search for** field, Jane Smith's record will be displayed because her assistant matches the search criteria you entered.

If only one match was found, the contact record is displayed. For more information on editing contacts, see *"Viewing And Modifying Contacts" on page 132*.

If no matches are found, the *No matches* dialog box opens. Click **OK**, then revise your search criteria and retry the search.

Note: If you are searching for **Search templates**, please see *"Saving a new search template" on page 184* in the "Advanced search" section.

Displaying all contacts using Quick search

This section tells you how to display all contacts from the *Search contacts* page. The **Search for** field must be blank in order to display all contacts.

To display all contacts:

1. Point to **Search** and then click **Search for contacts**.

   The *Search contacts* page opens with the **Quick search** tab displayed.

2. To display all contacts in your database, click **Display all** from the control menu.

   The *Search results* page opens, displaying a list of every contact in the database.

Using Advanced Search

An advanced search query lets you specify exact, detailed searches that can be saved as a search template for reuse.

Use the Advanced search feature to set up more detailed queries for records using search operators and partial descriptions to specify the exact nature of your search. You can then save these search queries as templates that can be used again in the future. See *"Using search templates" on page 184* for more information.

Using Boolean field operators

An advanced search operation uses Boolean logic, a form of algebra that uses the operators AND, OR, NOT within the search query. The query processes search variables based on true or false logic. Different search variables may have different types of search constraints, which are applied to them within each search query.

Numeric Field Constraints

The numeric field constraint options are displayed when you select a search criterion that is a numeric field. The available numeric selection criteria constraints include:

- **equal**
- **do not equal**
- **are greater than**
- **equal or greater than**
- **are less than**
- **are equal or less than**
- **range between**

For example:

List price equal to [x] will display those listings that match the list price that is exactly the specified value [x].

Alphanumeric Field Constraints

The alphanumeric field constraint options are displayed when you select a search criterion that is an alphanumeric field, one that accepts alphabetic as well as numeric characters.

The available alphanumeric selection criteria constraints include:

- **contain any of**
- **contain all of** (for queries with multiple values)
- **don't contain any of**
- **don't contain all of** (for queries with multiple values)
- **match any of**
- **match all of** (for queries with multiple values)
- **start with**

For example:

Phone number records that contain any of [x] will display those contact records that have phone numbers including any of the specified values.

Date Field Constraints

The date field constraint options are displayed when you select a search criteria that is a date or date range. The available date selection criteria constraints include:

- **on this date**
- **not on this date**
- **after this date**
- **before this date**
- **between these dates**
- **within the month of**
- **within the year of**

For example:

Expiry date on this date [x] will display those records that have the specified expiry date.

Yes/No Values

When you select some search criteria, such as **Air Conditioned** and **RV parking** in the **Listing** search category, the available value is either **Yes** or **No**. Make your selection from the drop-down list.

For example:

If you want to search for a property that has air conditioning, you could specify the following criterion during a **Listing** search:

Air conditioned = **Yes**

AND/OR Field Operators

When you assign the **AND** operator to search criteria within a category, the search process will find all contacts who meet both search criteria conditions. The operator is available when you have added more than one search string to the **Perform search based** on grid.

For example:

If you want to search for a property that has a specific price and is located in a certain area:

List price = [x] **AND** Area contains [y]

Your search will look for records that match both conditions.

When you assign the **OR** operator to search criteria within a category, the search process will find all contacts who meet either one or the other search criteria conditions.

For example:

If you want to search for a property that has a specific price or is located in a certain area:

List price = [x] **OR** Area contains [y]

Your search will look for records that match either the specified price or those that are located in a certain area.

Modifying the AND/OR operators in a search string

Once you have more than one search string entered into your query definition, you will see the AND/OR operators appear in between each string. Should you want to modify these in your search string(s), select the **Modify AND/OR** check box, then use the drop-down list to modify the value.

Note: Changing AND/OR between search strings will produce a completely different query.

For example:

If you want to search for a contact who is looking for an investment property downtown, and a home for their family on the West Side, the AND/OR operator enables you to perform this multiple search once, instead of having to perform two searches; one for the investment property and one for the family home.

The search string may look like this:

(Contacts = Investors

AND

Bedrooms = 3

AND

Area = Downtown)

OR

(Contacts = Friends

AND

Bedrooms = 5

AND

Area = West Side)

Note: Top Producer 7i will NOT show the brackets, as displayed in the example above.

Performing an Advanced search

This section tells you how to search for contact records using the Advanced search feature.

The **Advanced search** tab has three distinct grids from which to build your query:

- The left grid displays the search category and a list of related search criteria.
- The middle grid displays the type of Boolean constraints available, based on the selected criterion; the **Value** field, where you can enter a specific value; and/or a list of values that were used in your database records. See *"Using Boolean field operators" on page 179*.
- The **Perform the search based on** grid on the right displays the search string(s) that make up your query. This query can be saved as a search template for re-use. See *"Using search templates" on page 184*.

To build a search query, you follow several steps:

- Select a search category
- Select a search criterion
- Determine what constraints and/or values you want to use to narrow the search results
- Add the search string (criteria, constraint, and value) to the processing grid.
- Repeat for each search string in your query
- Use AND/OR operators, if required, between search strings to further define your query

To perform an advanced search:

1. Point to **Search**, then click the type of search you want to perform.

   For example, if you want to perform a contact search, click **Search**, then click **Contacts search**.

2. Click the **Advanced search** tab.

3. From the **Search category** drop-down list, select the type of criteria you want to search by.

4. Select a specific search criterion from the **Search criteria** grid.

   The **Search for** grid displays a complete list of all available values belonging to the search criterion you selected in the **Search criteria** drop-down list. These specific values are taken directly from the information in your database.

5. From the **Return records that** drop-down list, select a search constraint.

   The **Search for** list of values may or may not change to reflect the specified constraint.

Note: Most searches are text-based and use alphanumeric field operators to define a constraint. See *"Alphanumeric Field Constraints" on page 179*. However, there are also numeric searches and searches based on ranges and dates. The search constraints shown depend on the search criterion that has been selected. See *"Numeric Field Constraints" on page 179* and *"Date Field Constraints" on page 180*.

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6. Highlight an item from the **Search for** list
   OR
   Enter a value in the **Value** text box. If you are defining a range, enter both values.

7. Click the right arrow to add the item(s) to your search.

   The search criteria you specified appears in the **Perform search based on** grid.

8. Review the search string definition. To add more search parameters, repeat the procedure again until you are satisfied with the query definition.

9. Click the **Clear Search** link to clear your search string. This allows you to start building your query over from the beginning.

Note: Once you have more than one search string entered into your query definition, you will see the AND/OR operators appear in between each string. Should you want to modify these in your search string(s), select the **Modify AND / OR** check box. For more information see *"Modifying the AND/OR operators in a search string" on page 181*.

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10. Click **Start search** from the control menu.

    The *Search results* page opens.

    If only one match was found, the contact record is displayed. For more information on editing contacts, see *"Viewing And Modifying Contacts" on page 132.*

    If no matches are found, the *No matches* dialog box opens. Click **OK**, then revise your search criteria and retry the search.

Using search templates

If you have defined a search query that you know you will use again, you may save it as a search template, which you can re-use to perform a repeat search.

Saving a new search template

You can save a search template from either the **Advanced search** tab before you've performed a search, or after you've performed a search and are viewing the results in the *Search results* page.

To save a search template:

1. To save a search template from the:

    - **Advanced search** tab, click the **Save Search** link at the bottom right of the page
    - *Search results* page, click **Save search results** from the action menu.

    The *Save search template* pop-up window opens.

2. Enter a name for the new search template in the **Search template name** text box.

3. Click **OK**.

Using saved search templates

You can use an existing search template from the **Advanced search** tab to specify your search parameters.

To use an existing search template:

1. Click the **Search templates** link in the bottom left of the page.

   The *Select templates* pop-up window opens.

2. To:

   - make a copy of a saved template, click the **Copy** link. The *Copy search template* pop-up window opens. Enter a new name in the text box; or accept the default name with (copy) appended to the name, then click **OK**.
   - rename a saved template, click the **Rename** link. The *Rename [template name] search template* pop-up window opens. Enter a new name in the text box and click **OK**.
   - delete a saved template, click the **Delete** link. The *Delete [template name] search template* dialog box opens. Click **Yes** to confirm the deletion.

3. To use a search template, highlight the name of a template from the **Saved search templates** list and click **OK**.

Managing Leads

In this chapter:

About Leads

There are several types of leads, as outlined below.

Automatically generated leads

When a contact is interested in a posted listing on your REALTOR.com Marketing System web site, or fills in a lead inquiry form on your own web site, their information is automatically downloaded into Top Producer 7i and appears as a lead. You can apply all the same features to the lead that you can apply to a contact record. For more information on lead inquiry forms, see *"Creating a new lead inquiry form" on page 197*.

User-entered leads

If you do not have time to set up an action plan for a new contact, or an assistant is entering new contact information from a phone lead, you can manually enter a lead. You will be reminded in Lead manager that the lead requires follow-up. See *"Adding a new lead manually" on page 207.*

Duplicate record check

For new leads received via Realtor.com, AdvancedAccess, or from your lead inquiry form, Top Producer 7i performs a duplicate contact check when you open the new lead record for the first time. To enable this feature, go to the *Preferences* page and select the **Always check for duplicate contacts** check box, (see *"Specifying user settings" on page 103*).

For information on how the duplicate record check works, see *"Checking for duplicate leads" on page 205*.

Setting Up Top Producer 7i To Receive Leads

With Top Producer 7i, you can convert your web site leads into contact records automatically. Add an unlimited number of lead web sites and manage them from one location in Top Producer 7i.

About lead web sites

To address the need for more web-based data exchange solutions, Top Producer 7i now enables you to have leads pushed from any lead web site. You can manage an unlimited number of accounts from lead web site providers, such as REALTOR.com and AdvancedAccess.com.

First, you must sign up for the web site account and receive a valid username and password. Then, you can add the web site in Top Producer 7i to receive leads from the account.

Accessing the lead setup page

These instructions assume that you have already signed up for a lead web site account, for example, REALTOR.com or AdvancedAccess.com.

If you are part of a team or partnership account, you will initially see all accounts displayed for all members when you first open the *Lead setup* page. However, each member of the team is only allowed to modify, activate, or remove their own accounts. The **Account created for** column displays who created the account.

To access the Lead setup page:

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

   The *Lead setup* page opens.

2. Use this page to add, view, edit, or remove a lead web site, and to activate these lead web site accounts. You can also create a lead inquiry form without having a web site set up or active.

To add a lead web site:

1. From the *Lead setup* page, click **Add web site** from the action menu.

The *Add web site* pop-up window opens.

2. In the **Lead provider name** text box, enter the name of the lead provider, for example REALTOR.com. This is a required field.

Note: The **Lead provider name** is required, as it also indicates a lead's source which appears in the **Source** field on the contact record.

- In the **URL** text box, enter the web site URL supplied by your lead web site provider. For example: http://tpleads.realtor.com. This is a required field.
- In the **Username** text box, enter your username for the web site. This is not required when adding the web site, however, you will need this information to activate the site.
- In the **Password** text box, enter your password for the web site. This is not required at this time, however, you will need this information to activate the site.
- In the **Confirm password** text box, retype your password.
- If you are part of a team account, select the agent the account is being created for from the **Account created for** drop-down list.
- Click **OK**.

To add a REALTOR.com Marketing System web site:

1. From the *Lead setup* page, click **Add Realtor.com** from the action menu.

Note: The **Lead provider name** and **URL** fields are already filled in with the necessary information and are view-only.

2. In the **Username** text box, enter your username for your REALTOR.com Marketing System account.

3. In the **Password** text box, enter your password, then retype it exactly in the **Confirm password** text box.

4. If you are part of a team account, select the agent the account is being created for from the **Account created for** drop-down list.

5. If you need assistance with your REALTOR.com Marketing System account, use one of the following hyperlinks:

   - **Don’t have a REALTOR.com Marketing System, sign up today!** — Click this link to open the REALTOR.com web site in a new browser window. If you are a Canadian customer, you will be directed to the following web site (www.homestore.ca) where you can sign up for an account.
   - **Get your REALTOR.com Marketing System username** — Click this link to open a new browser page to receive your REALTOR.com Marketing System username. Have your MLS board name, ID and password ready.
   - **Still having problems? Contact technical support** — Click this link to open a new email message page addressed to CustomerCare@REALTOR.com.
   - **Did you forget your password?** — Click this link to open the REALTOR.com web site in a new browser window. You will be able to look up your password by answering a secret question.

Note: Once you have successfully registered with REALTOR.com, your account will be activated.

6. Click **OK**.

Adding an AdvancedAccess.com web site

You can set up Top Producer 7i to receive leads from an AdvancedAccess.com web site.

To add an AdvancedAccess.com web site:

1. From the *Lead setup* page, click **Add web site** from the action menu.

   The *Add web site* pop-up window opens.

2. Enter the following information:

   - In the **Lead provider name** text box, type **AdvancedAccess**. This is a required field.
   - In the **URL** text box, type the web site URL **http://topproducer.advancedaccess.com/leads.aspx**. This is a required field.
   - In the **Username** text box, enter your Intellicards 3 account ID. This is not required when adding the web site, however, you will need this information to activate the site.
   - In the **Password** text box, enter your Advanced Access password. This is not required at this time, however, you will need this information to activate the site.

   Note: Your password is case sensitive and must be typed in with the correct use of upper and lower case characters.

   - In the **Confirm password** text box, retype your password.
   - If you are part of a team account, select the agent the account is being created for from the **Account created for** drop-down list.

3. Click **OK**.

Viewing or editing the lead web site

The *Lead setup* page displays the following information about your lead web sites:

- **Lead provider name** — Displays the lead provider name for your accounts, for example, REALTOR.com.
- **URL** — Displays the web site URL supplied by your lead web site provider, for example, http://tpleads.realtor.com.
- **Account status** — Displays the status of your accounts, for example, **Active**, **Inactive**, or **Invalid**. The status is only displayed after you have attempted to register with the web site provider by entering your username and password.

- **Account created for —** Displays who entered the account. This column is only displayed if you are part of a team account.

To view or edit your lead web site:

Note: If you are part of a team or partnership account, you can only modify web sites that you have added. When another team member's web site is selected, the **View or edit web site** action menu item is unavailable.

1. From the *Lead setup* page, highlight a web site from the list and click **View or edit web site** from the action menu.

2. If you selected a REALTOR.com Marketing System account, you will be able to view or edit the fields as outlined below. If you selected a non-REALTOR.com web site, skip to step 3.

    - The **Lead provider name** and **URL** text fields are already filled in and are view-only.
    - The **Username** text box displays the username information, only if the web site has been activated. Make any changes, if necessary, or if the field is blank, add the username now.
    - The **Password** and **Confirm password** text boxes display asterisks for the password information, but only if the web site has been activated. Make any changes, if necessary, or if the fields are blank, add the password information now. Re-type it exactly in the **Confirm password** text box to confirm.
    - If you are part of a team account, the **Account created for** drop-down list displays who the account belongs to. Make any changes, if necessary.
    - Use the hyperlinks, if required, to get assistance from the REALTOR.com Marketing System web site. See step 4 of *"To add a REALTOR.com Marketing System web site:" on page 189*.

If you need assistance with your REALTOR.com Marketing System account, there are four hyperlinks on the page to help you.

3. If you selected a non-REALTOR.com web site from the list, the *View or edit web site* pop-up window is displayed. View or edit the following fields:

    - The **Lead provider name** and **URL** text fields are already completed. Make any changes to the information, if necessary.

- The **Username** text box displays the username information, only if the web site has been activated. Make any changes, if necessary, or if the field is blank, add the username now.
- The **Password** and **Confirm password** text boxes display asterisks for the password information, but only if the web site has been activated. Make any changes, if necessary, or if the fields are blank, add the password information now. Re-type it exactly in the **Confirm password** text box to confirm.
- If you are part of a team account, the **Account created for** drop-down list displays who the account belongs to. Make any changes, if necessary.

4. Click **OK**.

Removing a lead web site

Deleting a web site will sever the connection between the web site and Top Producer 7i, causing you to no longer receive leads from the web site.

Note: If you are part of a team or partnership account, you can only delete web sites that you have added. When another team member's web site is selected, the **Remove web site** action menu item is unavailable.

To remove a lead web site:

1. From the *Lead setup* page, highlight a web site from the list and click **Remove web site** from the action menu.

   The *Remove web site* dialog box opens.

2. Click **OK** to confirm the site removal.

   The web site is removed and you will no longer receive leads from this web site.

Activating/deactivating a lead web site

Once a web site has been successfully set up and activated, it will automatically push leads to Top Producer 7i.

If you are working with a REALTOR.com Marketing System web site account, the site is activated when you have successfully registered. You can, however, still deactivate the account if you want to stop receiving leads.

> **Note:** If you are part of a team or partnership account, you can only activate/deactivate web sites that you have added. When another team member's web site is selected, the **[Activate/Deactivate] web site** action menu item is unavailable.

To activate a lead web site:

1. From the *Lead setup* page, select the web site you want to activate. You may want to check the following:

   - The **Account status** column should display **Inactive**. If the column is blank, the username and password information has not been entered yet.
   - If the **Account status** column displays **Invalid**, your account cannot be activated until you have successfully registered with the lead web site provider.
   - If the action menu for the selected web site reads **Deactivate web site** instead of **Activate web site**, this indicates the site has already been activated.

2. From the action menu, click **Activate web site**.

   The **Account status** column now displays **Active** for the selected web site account. Leads will now be pushed from this lead web site to Top Producer 7i.

Deactivating a lead web site

1. From the *Lead setup* page, select the web site you want to deactivate. You may want to check the following:

   - The **Account status** column should display **Active**. If the column is blank, the username and password information has not been entered.
   - If the action menu for the selected web site reads **Activate web site** instead of **Deactivate web**

site, this indicates the site has already been deactivated.

2. From the action menu, click **Deactivate web site**.

   The **Account status** column now displays **Inactive** for the selected web site account. Leads will no longer be pushed from this lead web site to Top Producer 7i.

Working With Lead Inquiry Forms

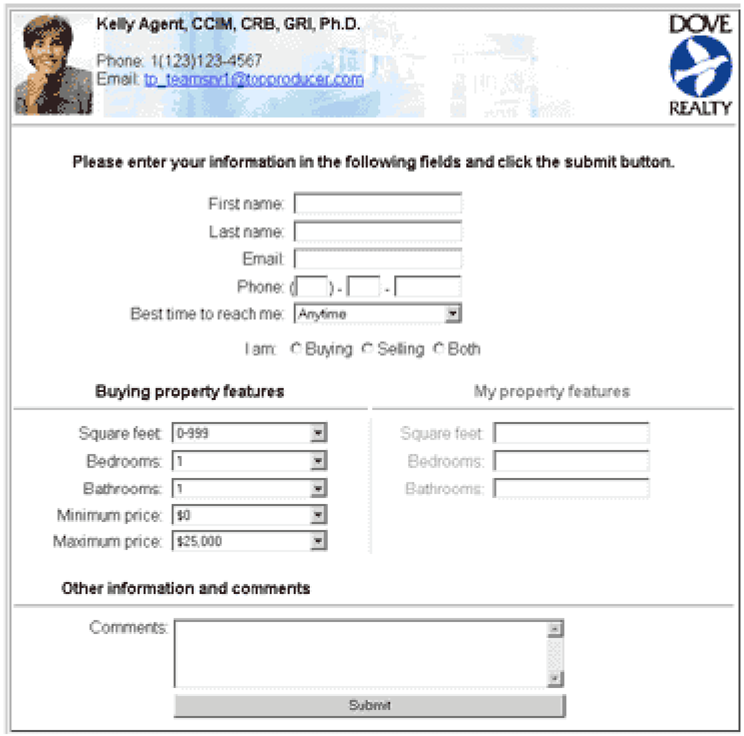
You can enter a lead inquiry form independently from the lead web site accounts on the *Lead setup* page. That is, the sites are not required to be active for you to be able to create a lead inquiry form.

The *Lead inquiry form* page displays the types of lead inquiry forms you have prepared and the Internet addresses (URLs) of where you currently have them posted.

You can create an unlimited number of up to 3 different types of forms for use on your personal or company web site:

- **Simple page layout**
- **Standard page layout**
- **Detailed page layout**

Once these pages have been created, visitors of your web site can use these forms to request more information about your listings or services. When a visitor uses one of your lead inquiry forms, they appear in the Lead manager as a new lead.



Accessing the lead inquiry form

To access the lead inquiry form:

- Point to **Setup**, then click **My lead inquiry form**.

Creating a new lead inquiry form

You can create ready-made simple, standard or detailed inquiry forms. When you have created the form, you have two options:

- You can simply download a URL web address that points to the form which is maintained on the Top Producer 7i servers. When a user clicks the URL, the lead inquiry form will open.
- If you are an experienced web site administrator, you can download the html source code to integrate the form into your web site. You have the choice to use Active Server Pages (ASP) or CGI scripts.

To create a new lead inquiry form for your personal web site:

1. From the *Lead inquiry form* page, click **Create new** from the action menu.

   The *Create lead inquiry form wizard* opens.

2. Under **Page layout**, choose one of the following options:

    - **Simple page layout**
    - **Standard page layout**
    - **Detailed page layout**

> **Note:** You can create an unlimited number of each type of layout.

    When you click the option button for each form type, an example of the selected page's appearance is shown to the right.

3. Click the **Source** list icon and select an inquiry form source item from the pick list. The default value is **Agent personal web page**. This is a required field.

> **Note:** You cannot select **Referral** as a **Source**.

4. Click the **Inquiry form** list icon and select an inquiry form from the pick list. The default value is **Default form**.

5. If you are part of a team or partnership account, select the agent you are creating the inquiry form for from the **Agent** drop-down list box.

6. Click **Next** to continue.

New leads will appear in Lead manager (see *"About Leads" on page 187*), where you can easily apply an appropriate follow-up action plan.

7. Click the **Location of agent picture** drop-down list box (located in the top right corner of the page) to select where you want the agent picture and company logo to appear: **Top right**, **Top center**, or **Top left of the page**.

8. To add a new agent picture or company logo click the **Add** link under each picture frame.

    - The *Select picture* pop-up window opens. In the **Look in** drop-down list, select the drive where the picture is saved. Select the folder where the picture is saved, then select the file and click **Open**.

9. If you have multiple images, use the **<<Previous** and **Next>>** controls to change between the agent pictures or company logos.

10. Click **Next**.

11. You can customize the text, background, and section heading colors.

    - Click a color swatch on each of the three color palette grids to define the desired colors.
    - Select the **Use Top Producer background** check box if you want to use the program's default color values.

> **Note:** Selecting the Top Producer background sets all appearance options. Other controls on this page will be disabled.

12. Use the drop-down lists to the right of the page to select the desired font style, text size, and header text size values.

13. If you want to redirect users to your own personal *"Thank you"* page:

    - Select the **I want to use this URL for my "Thank you" page instead** check box, then enter the web page's URL in the text box.
    - Click the **Preview my "Thank You" page** link to see what your finished *"Thank you"* page will look like on the Web.

14. To see what your finished form will look like on the web, click the **Preview my lead inquiry form now** link. A new browser window opens to display your form.

    - Exit the window if you need to make any changes.

15. Click **Finish**.

    The new form appears on the *My lead inquiry form* page.

Customizing your lead inquiry form - for advanced users only

If you are an advanced user or web site administrator and you want to use the source code on your own web site, you can save the new form you created in .ASP or .CPP format.

To get the source code for the new lead inquiry form:

1. Highlight the new form on the *My lead inquiry form* page.
2. Click **Get source code** from the action menu.
3. Select the file format you want to use from the pop-up window:
   - **.ASP format** for an Active Server Page source code (this requires Windows NT Server or Windows 2000 Advanced Server).
   - **.CPP (CGI) format** for a CGI script form (this requires that your server be able to run CGI scripts).
4. Click **OK**.

   The *Get source code* pop-up window opens.
5. Select the location you want to save the source code and select **Save**.

> **Note:** Top Producer Technical Support does not provide help with using source code on your web site.

6. Click **Close** to return to the main menu.

To custom-create a lead inquiry form:

If you are using source code in your web site, you can create a customized form where you choose which data fields can be submitted with a lead.

1. From the *My lead inquiry form* page, click **Create custom** from the action menu.

   The *Lead source code generation* page opens.
2. To:
   - Select the fields you want to include in the form from the **List of available fields** section, then click **Add** to move them into the **List of fields to generate source code** section.
   - To select multiple fields, hold down the **[CTRL]** key while selecting fields.
   - To remove fields from the form, select them in the **List of fields to generate source code** section

and click **Remove**. The fields appear in the **List of available fields** section.

Note: Certain fields are required and cannot be removed.

- To change the order the fields will appear in the form, select them and use the **Move up** or **Move down** links.

3. To preview the form, click **View in browser** from the action menu. The form is displayed, as is, in a new browser window.

4. Click **Generate source code** from the control menu to produce the source code.

5. Select the file format you want to use from the pop-up window:

   - **.ASP format** for an Active Server Page source code (this requires Windows NT Server or Windows 2000 Advanced Server).
   - **.CPP (CGI) format** for a CGI script form (this requires that your server be able to run CGI scripts).

6. Click **OK**.

7. The *Get source code* pop-up window opens. Select the location you want to save the source code and select **Save**.

Note: Top Producer Technical Support does not provide help with using source code on your web site.

Uploading a lead inquiry form to the web site

Once you have designed your new lead inquiry form, you have two options as to how you place the form on your web site. One option is to use the **Get source code** action menu command. For information on working with this procedure, see *"To get the source code for the new lead inquiry form:" on page 200*.

The second option is to use a URL address on your web site that points to the lead inquiry form.

1. From the *My lead inquiry form* page, highlight a form in the list.

2. Click **Get URL** from the action menu.

   The *Get lead inquiry form address (URL)* pop-up window opens, displaying the URL currently in use.

   a) highlight the URL in the text box (or press **[Ctrl + A]**), then press **[Ctrl + C]** to copy it.

   b) open your web site management program (or an HTML file) and use **[Ctrl + V]** to paste it into the program.

Note: How you do this depends on the web site management software you use. Refer to the documentation for the site management software for instructions.

Viewing or editing a lead inquiry form

You can easily make edits to the lead inquiry forms you create.

To view or edit a lead inquiry form:

1. From the *View or edit inquiry form* page, modify your inquiry form. For more information, see *step 2 on page 198*.

2. To see what your modified form will look like on the Web, click **Preview my lead inquiry form now**.

   A new window opens to display your form. Close the window and make any changes.

3. Click **Finish** when satisfied with your form.

Viewing a lead inquiry form

You can quickly view a lead inquiry form in a browser window to see how it will look on the Web.

To view the form in your Browser

1. From the *My lead inquiry form* page, highlight a lead inquiry form in the list.
2. Click **View in browser** from the action menu.

   A new browser window opens, displaying the selected lead inquiry form.

Deleting a lead inquiry form

To delete a lead inquiry form you have created:

1. From the *My lead inquiry form* page, highlight a lead inquiry form in the list.
2. Click **Delete** from the action menu.
3. When the *Delete lead inquiry form* dialog box opens, click **Yes** to confirm deletion.

> **Note:** If you delete a lead inquiry form, all links to the page will be broken.

Using The Lead Manager

Top Producer 7i provides a sophisticated facility for lead management, so that you can ensure that leads are always followed up promptly and effectively. With the Lead manager, you can maintain a list of new leads, which remains separated from your regular contact records until you perform follow-up actions. Once you complete an activity and mark it done, the lead's status changes to 'Followed up'.

Accessing the lead manager

You can access the Lead manager from three locations:

- Point to **Contacts** and click **Leads**.
- Point to **Schedule**, **Today's business**, then click **Leads**.
- Point to **Schedule**, **Today's business**, then click **Summary**. From the *Today's business for [date]* page, click the **Leads** link.

About the lead manager

The Lead manager displays a list of all your leads. From this page, you can fully manage your leads.

To view the Lead manager:

1. Point to **Contacts**, then click **Leads**.

   The *Lead manager* page opens, where you can view the following information:
   - **Date time** — shows the date and time the lead was created or generated from your REALTOR.com web site.
   - **Name** — shows the name of the lead in [last name, first name] format.
   - **Contact at** — shows the lead's preferred contact number. This is the number where they can most likely be reached, and is specified on the *Contact information* page.
   - **Source** — shows where the lead was generated from. This may be REALTOR.com, or another web site.
   - **Status** — shows the lead's status, such as **New**, **Followed up**, **Listing**, **Listing-closing** or **Closing**.

- **Assigned to** — shows who the lead is assigned to. This column is only available if you are part of a team or partnership account.

2. You can sort the leads in ascending or descending order by clicking any column heading in the list.

3. Click the drop-down list to display only leads of a specified status:

   - **New** — a new lead that has not yet been followed-up.
   - **Followed up —** the first scheduled follow-up activity for the lead has been completed.
   - **Listing —** a listing has been created from the lead.
   - **Listing-closing —** a closing has been created from a lead listing.
   - **Closing —** a closing has been created from the lead without first creating a listing.

When you first open the Lead manager, all new leads are downloaded.

4. Click the **Check for new leads** link to refresh the list of leads, in case any new leads have been received since you opened the Lead manager.

5. Highlight a lead in the list, or click **Select all**, then use the action menu items to work with the lead(s).

6. Click **Close**.

Checking for duplicate leads

Top Producer 7i has a duplicate record check feature that searches your leads for duplicate names, home and business phone numbers, and email addresses. The feature checks for an exact match in the following scenarios:

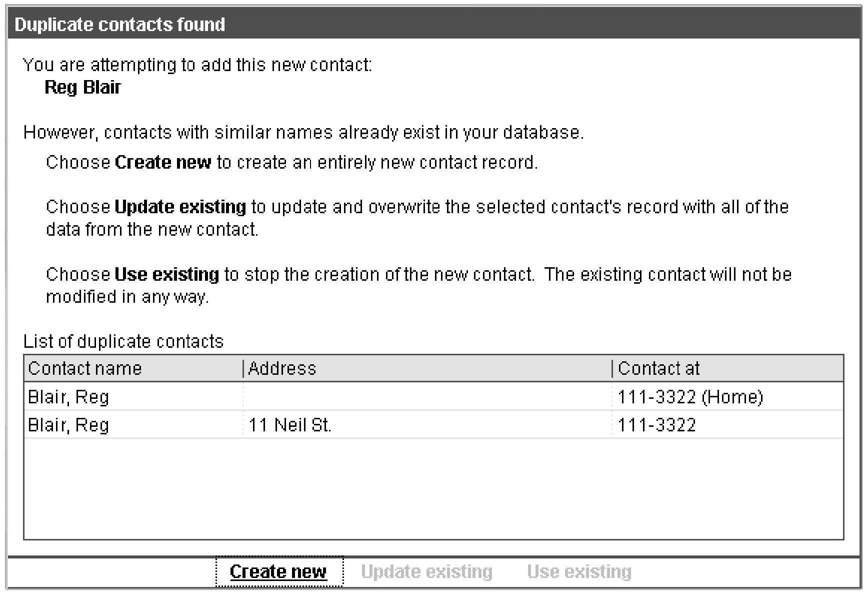
- the lead's primary first and last name (regardless of contact information) is the same
- the lead's secondary first and last name (regardless of contact information) is the same
- a company name (if no other name details are entered) is the same

When enabled from the *Preferences* page (see *"Specifying user settings" on page 103*), the feature checks for duplicate records:

- when you receive a new lead from REALTOR.com, Advanced Access, or the lead inquiry form and open the record for the first time; or
- when you add and save (by clicking **OK**) a new lead record that you entered manually

Finding a duplicate contact record

If Top Producer 7i finds a duplicate contact record during one of the scenarios listed above, the *Duplicate contact found* pop-up window opens.



1. Highlight a record in the **List of duplicate contacts** section of the pop-up window.

2. You will be asked to perform one of the following actions, based on your selection:

   - **Create new** — Click this button to create a new contact record, regardless of whether it is a duplicate or not.
   - **Update existing** — Click this button to overwrite certain existing field information and merge new data into the existing selected record.
   - **Use existing** — Click this button to save the existing selected contact record, as is, without modification. The duplicate contact record (along with its linked listings, closings, referrals, flyers, and presentations) will be deleted.

Note: The listings, closings, flyers, presentations, mailouts, and emails, etc. will be kept for existing contact records.

Note: In order to keep the contact record as a lead, you must have a value in the **Source** and **Inquiry form** fields.

For more information on the Duplicate record check feature as it applies to contact management, see *"Checking for duplicate contacts" on page 122*.

Adding a new lead manually

To add a new lead to your database, you can receive the lead from your web site (if applicable), or you can manually enter a new lead. If you do not have time to set up an action plan for a new contact, or an assistant is entering new contact information from a phone lead, enter the contact through Lead Manager rather than from the Address book.

When the time comes to apply an action plan to the lead, rather than having to search through the whole contact database for the lead, it will appear in the Lead Manager as requiring action.

If you enter a source in a regular contact record, it will be considered a lead and will henceforth appear in Lead manager.

To manually enter a lead:

1. From the *Lead manager* page, click **Add new lead** from the action menu.

   The *Source* pick list automatically opens.

2. You must select a lead source from the list, or type one in the field provided. Click **OK**.

3. Enter the lead information just like any other contact. The contact will appear in the **Lead manager** list, ready for follow-up or to have an action plan applied.

   For detailed information on the fields and tabs of the *Detailed contact entry - Add new contact* page, see *"Creating a contact record" on page 124*.

Viewing or printing a lead report

You can display leads of a specified type, then run a report from the Lead manager.

To generate a leads report:

1. From the *Lead manager* page, click the **Only display leads with the following status** drop-down list and choose a status from the list.

   The corresponding lead types are displayed in the list.

2. Highlight one or more leads from the list, then click **View report** from the action menu.

A new browser window opens with the lead report displayed.

3. Use the browser controls to print the report, if desired.

Sending an email

You can send an email to a selected lead, however, they must have a valid email address entered in their contact information.

To send an email to a lead:

1. From the *Lead manager* page, highlight a lead in the list.

2. Click **Mass email** from the action menu.

   The *Mass email* page opens, with the lead's email address already filled in.

3. Follow the instructions on composing and sending emails in the Email chapter. See *"Composing And Sending Email" on page 352*.

4. Click **Next**.

5. Review the email and make any changes, then click **Send** from the control menu.

Performing a mail out

You can send a mailing to a selected lead.

To send a letter, envelope, label, or postcard to a lead:

1. From the *Lead manager* page, highlight a lead in the list.
2. Click **Perform mail out** from the action menu.

   The *Perform mail out - select template* page opens.
3. Follow the instructions on performing a mail out in the Mail chapter. See *"Performing A Mail Out" on page 337*.

Sending a flyer link

You can send a flyer link to a selected lead.

To send a flyer link to a selected lead:

1. From the *Lead manager* page, highlight a lead in the list.
2. Click **Send flyer** from the action menu.

   The *Send flyer* page opens, displaying a list of existing flyers.
3. Select a published flyer from the list and click **OK**.

   The *Send flyer link* wizard opens displaying a link to the published flyer in the body of an email message.
4. Follow the instructions on sending a flyer in the Flyers chapter. See *"Sending Flyers To Contacts" on page 385*.
5. Click **Next**.
6. Review the email and make any changes, then click **Send** from the control menu.

Creating a presentation

You can create a presentation for a selected lead.

To create and send a presentation link to a selected lead:

1. From the *Lead manager* page, highlight a lead from the list.
2. Click **Create presentation** from the action menu.

   The *Create CMA - Select template* page opens.

3. Select one of the **Presentation type** option buttons.

4. Click the **Template Category** drop-down list and choose the name of a template category.

5. Highlight a template from the list and click **Finish**.

6. Follow the instructions on creating a new presentation in the Presentations chapter. See *“Creating A New Presentation” on page 409*.

7. After you have created the presentation, you can save it as a PDF file and send it as an attachment, publish it to the web and send a link via email, or print it out. See *“Working With Saved Presentations” on page 435*.

Following up on a lead

You can have action plans automatically applied to leads from your lead web site (for example from REALTOR.com).

Follow up on leads by applying an action plan, which automates your follow-up activities, or by scheduling an individual follow-up activity for the lead. For information on lead status, see *“About the lead manager” on page 204*.

To apply an action plan to the lead:

1. From the *Lead manager* page, highlight a lead from the list.

2. Click **Apply action plan** from the action menu.

   The *Apply action plan* pop-up window opens.

3. Select an action plan you want to apply from the **Available plans** grid.

4. Click the **Add** button to add the plan to the **Current plans** grid.

   The *Select plan start date* pop-up window opens.

5. Type a start date for the selected action plan, or click the calendar icon to choose from the calendar. Click **OK**.

6. Click **OK** to close the *Apply action plan* pop-up window. The plan appears on the *Contact details for [lead name]* page. See *“Working With Lead Details” on page 214* and *“Working With Plans” on page 231*.

To schedule a follow-up activity for a selected lead:

1. From the *Lead manager* page, highlight a lead from the list.
2. Click **Schedule follow-up** from the action menu.

   The *Add new activity* page opens.
3. Select the activity type that you want to create for the lead and click **Next**.
4. Follow the instructions on creating new activities in the Activities chapter. See *“Scheduling An Activity” on page 259*.

> **Note:** Once the follow-up activity has been marked done, the lead’s status will change to *“Followed up”* and it will no longer appear in Lead manager as a lead with *“New”* status.

5. To see leads that have been followed up, select **Followed up** from the drop-down list on the *Lead manager* page. For more information on marking events done, see *“Marking An Activity Done” on page 273*.

Setting up auto apply action plans

You can set up the rules for automatically applying action plans to your leads as soon as they are accepted into your system.

To set up the auto apply action plans:

1. From the *Lead manager* page, click **Auto apply plans setup** from the action menu.

   The *Auto apply plan rules* page opens.
2. Follow the instructions in the Plans chapter to set up the rules. See *“Working With Plans” on page 231*.

Entering a completed activity

If you have completed an activity (for example an unscheduled phone call) outside of Top Producer 7i, you can enter it manually and enter a description into the contact history.

To enter a completed activity:

1. From the *Lead manager* page, highlight a lead from the list.

2. Click **Enter completed activity** from the action menu.

   The *Enter completed activity for [lead name]* pop-up window opens.

3. Complete the following fields:

   - **Activity type** — click the drop-down list and select the type of activity you performed.
   - **Date completed** — enter the date this activity was completed; or click the calendar icon to select from the calendar.
   - **Time** — use the spin buttons to set the time you completed this activity.
   - **Description** — enter a brief description for the activity in the text box.

4. Click **OK**.

   The lead no longer appears as a new lead in the Lead manager. To see it, select **Followed up** from the drop-down list.

5. Click **View or edit** from the action menu.

   The *Contact details for [lead name]* page opens.

6. Click **View history** from the action menu to see the completed activity you just entered.

Assigning a lead to another team member

If you are part of a team or partnership account, you can assign a lead to another team member.

Note: If the lead's record that you want to assign is already displayed, skip to step 2.

1. From the main menu, point to **Contacts** and then click **Leads**.

   The *Lead manager* page opens.

2. Select the lead you want to reassign, and then click **Assign to agent** from the action menu.

   The *Select agent* page opens.

3. Select the team member you want to assign the lead to, then click **OK** from the control menu.

The lead will appear on the *Lead manager* page with the agent's name displayed in the **Assigned to** column. Also, when the lead's contact record is displayed, the assigned agent's name will appear in the top right.

Deleting a lead from lead manager

You can delete a lead from the *Lead manager* page, or while viewing it from the contact record. When a lead is deleted, all associated properties, activities and active listings and closings are also deleted. However, any frozen listings or closings associated with the lead will remain in the database. Frozen listings have a status of **Canceled**, **Withdrawn**, or **Expired**. Frozen closings have a status of **Fell thru** or **Closed / Paid**.

Note: If you are an assistant or are part of a team or partnership account and the **Delete** action menu item is unavailable, this indicates the responsible agent has not granted you deletion permissions. Contact the database owner for deletion rights.

To delete a lead from the Lead manager:

1. Highlight a lead from the list.
2. Click **Delete** from the action menu.

   The *Delete lead* dialog box opens.
3. Click **Yes** to confirm deletion of the selected lead.

Working With Lead Details

Leads are identical to contacts except that a lead record has an entry in the **Source** field and has a lead **Status**. Otherwise the fields and tabs on the *Contact details for [lead name]* page are the same as working with a contact record. For more information, see *“Creating a contact record” on page 124*.

Viewing or editing leads

To view leads of a specific status:

- From the *Lead manager* page, click the **Only display leads with the following status** drop-down list and select a lead status.

To view or edit a selected lead’s details:

1. From the *Lead manager* page, highlight a lead from the list.
2. Click **View or edit** from the action menu.

   The lead is displayed in the *Contact details for [contact name]* page, like any other contact record.
3. You can apply all program features that can be applied to contacts to the leads, as well. Follow the instructions for adding contacts. See *“Creating a contact record” on page 124*.
4. Use the action menu items to work with the selected contact (lead):

   - **Create flyer** — design a new flyer for the selected contact. See *page 379*.
   - **Send flyer** — send an email message with the flyer link in the body of the email. See *page 209*.
   - **Create presentation** create a new presentation for the selected contact. See *page 209*.
   - **Schedule follow-up** — create and schedule a new activity for the selected contact. See *page 210*.
   - **Perform mail out** — send a letter, envelope, label, or postcard to the selected contact. See *page 209*.

- **View history** — view the past year's worth of completed activities for the selected contact. See *page 211* and *"Reviewing Historical Activities" on page 278*.
- **View listings** — view any current listings for the selected contact. See *page 457*.
- **View closings** — view any current closings for the selected contact. See *page 520*.
- **View report** — view and print one of the many contact reports available. See *page 593*.
- **Assign to agent** — assign the currently displayed lead to another team member. See *"Assigning a lead to another team member" on page 212*.
- **Create referral** — change the selected lead into a referral. If you do this, the **Source** field will change to **Referral** and the contact will now be displayed on the *Referral manager* page. See *page 228*.
- **Delete contact** — click **Delete contact** from the action menu. When the *Delete contact* dialog box opens, click **Yes** to confirm the deletion

5. Click **Close**.

Note: When a lead is deleted, all associated properties, listings, closings, and assigned activities are also deleted.

Managing Referrals

In this chapter:

Using The Referral Manager

The Referral manager is the coordination center for all your referral records. You can track the referrals you send and receive, view referral sources, view the referred contact details and the details of each referral agreement.

You can view detailed referral statistics or print them in report form. The Referral manager even includes a *Top referral sources* page that lets you track those who send you the most referral business, so you can strategically reinforce those connections.

Converted Leads

In Top Producer 7i, when you convert a lead into a referral, the converted lead will be displayed on the *Referral manager* page and the **Source** field will show **Referral**.

Accessing the Referral manager

The Referral manager displays a list of all your referrals. From this page, you can fully manage your referral records.

To view the Referral manager:

1. Point to **Contacts** and click **Referrals**.

   The *Referral manager* page opens.

2. View the following information:

   - **Referral date** — the date that the referral was either sent or received.
   - **Transaction status** — the referral's transaction status, such as **Active**, **Pending**, **Closed**, etc.
   - **Direction** — the referral's direction, either **Sent** or **Received**.
   - **Referral source** — the source, such as a relocation company.
   - **Referred contact** — the name(s) of the referred contact(s).
   - **Referred by / to name** — the name(s) of the referring contact(s).
   - **Progress status** — the referral's progress status, such as **New**, etc.

- **Assigned to —** who the referral is assigned to. This column is only available if you are part of a team or partnership account.

3. Click the **Check for new referrals** link (located just below the **Referral direction** drop-down list) to refresh the list and see any new referrals that have been received since you last opened the Referral manager.

To search for referrals:

1. Click the **Search by** drop-down list, and select a category to search by:
   - **Referral direction**
   - **Referral source**
   - **Referral progress status**
   - **Referred by / to name**
   - **Referred contact name**
   - **Referral transaction status**
2. The second drop-down list options will change to reflect the **Search by** selection you made in step 1. Select the option that you want to search for.
3. Click **Start search**.

   Referrals matching your search are displayed.

Checking for duplicate referrals

Top Producer 7i has a duplicate record check feature that searches your for duplicate names, home and business phone numbers, and email addresses. The feature checks for an exact match in the following scenarios:

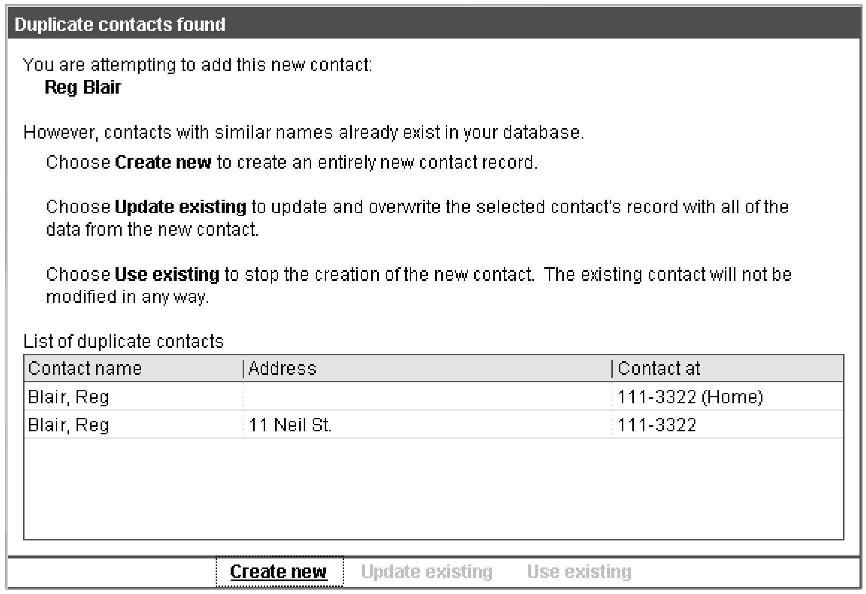
- the referral's primary first and last name (regardless of contact information) is the same
- the referral's secondary first and last name (regardless of contact information) is the same
- a company name (if no other name details are entered) is the same

When enabled from the *Preferences* page (see *"Specifying user settings" on page 103*), the feature checks for duplicate records:

- when you add and <u>save</u> (by clicking **OK**) a new referral record that you entered manually.

Finding a duplicate contact record

If Top Producer 7i finds a duplicate contact record during one of the scenarios listed above, the *Duplicate contact found* pop-up window opens.



1. Highlight a record in the **List of duplicate contacts** section of the pop-up window.

2. You will be asked to perform one of the following actions, based on your selection:

   - **Create new** — Click this button to create a new contact record, regardless of whether it is a duplicate or not.
   - **Update existing** — Click this button to overwrite certain existing field information and merge new data into the existing selected record.
   - **Use existing** — Click this button to save the existing selected contact record, as is, without modification. The duplicate contact record (along with its linked listings, closings, flyers, and presentations) will be deleted.

Note: The listings, closings, flyers, presentations, mailouts, and emails, etc. will be kept for existing contact records.

For more information on the Duplicate record check feature as it applies to contact management, see *"Checking for duplicate contacts" on page 122*.

Creating a referral

Creating a referral involves two parties, therefore you must select or create two contacts in your database.

Note: The referred by/to contact is the person you receive referrals from and send referrals to. The FIRST time a referral is received from/ or sent to this contact, click **Create referral** from the action menu to create their referral record. After this, any time you have future referral business with this contact, select their existing record and click **Add new referral** from the action menu.

To create a new referral record:

1. From the Referral manager, click **Create referral** from the action menu.

   The *New referral* wizard starts.

2. Select the referred contact(s), by doing one of the following:

   Click **Next** without entering any information in the search area to display all referrals in the database.

   - search for the referred contact by selecting either the **Name** or **Address** option, then entering the corresponding search criteria in the text boxes provided. Click **Next**. Select the referred contact(s) from the search results list and click **Next**.
   - create a new referral contact record for your database by selecting the **Don't search. I will create new contacts** check box. Click **Next**. Enter as much information as you can in the *Detailed contact entry - Add new contact* page, then click **OK**.

3. Select the referral direction:

   - click **Sent** if you are sending this contact to another agent.
   - click **Received** if another agent has referred this contact to you.

4. Click **Next**.

5. Select the referred by/to contact or agent, by doing one of the following:

   - search for the contact you are sending/receiving this referral to/from by selecting either the **Name** or **Address** option, then entering the corresponding search criteria in the text boxes provided. Click **Next**.

- create a new referred to/by contact record for your database by selecting the **Don't search. I will create new contacts** check box. Click **Next**. Enter as much information as you can in the *Detailed contact entry - Add new contact* page, then click **OK**. Select the contact(s) you are sending/receiving a referral to/from from the list and click **Finish**.

The *Referral details* page is displayed, where you can view or edit the referral record details.

For more information, including viewing or editing referrals, and performing a mail out, see *"Working With Referral Details" on page 228*.

Sending email

You can send out mass emails to the parties associated with a selected referral(s). You must have your email account setup in Agent setup.

To send mass email by selection from the Referral manager:

1. From the Referral manager, highlight a referral record from the list. They must have a valid email address in their contact information.

2. Click **Send email** from the action menu.

   The *Mass email* page opens. See *"Sending Mass Email" on page 356*.

To send mass email while viewing a referral record:

1. From the *Referral details* page of a selected referral, click **Send email** from the action menu.

   The *Mass email* page opens. See *"Sending Mass Email" on page 356*.

To send mass email while viewing the referred by/to details:

1. From the *Referral details* page of a selected referral, click **View or edit referred by/to details** from the action menu.

   The *Referred by/to details* page for the referring party page opens.

2. Click **Send email** from the action menu.

   The *Mass email* page opens. See *"Sending Mass Email" on page 356*.

Viewing or editing referred contact

You can view or edit the contact record of the referred contact.

To view or edit the referred contact record:

1. From the Referral manager, highlight a record from the list.
2. Click **View or edit referred contact** from the action menu.

   The *Contact details for [contact name]* page opens. See *"Managing Contacts" on page 121* for more information.

Viewing or editing referred by/to details

Use the *Referred by/to details* page to view or edit the details of the agent or contact to whom the referral was sent or received, and related statistics.

To view or edit the referred by/to details:

1. From the Referral manager, highlight a record from the list.
2. Click **View or edit referred by/to details** from the action menu.

   The *Referred by/to details* page opens. The top section of the page displays the referred by/to contact's name and address.
3. Click the contact's name link to view or edit their contact record.
4. Click the **Contact type** link to display the pick list of contact type(s). Click the drop-down list to view any contact types that are currently applied.
5. Click the **Action plan** link to apply or modify the contact's action plan(s). Click the drop-down list to view any action plans that are currently applied.
6. If there is a call scheduled to the contact, the first scheduled call's date will be displayed in the **Next call date** field. Click the **Next call date** link to schedule a new call.
7. Click the **Statistics** tab to display the referral business statistics for this contact.
8. Click the **Contacts referred** tab to view a list of referrals that you have received from and sent to this contact.

9. Click the **Referred by/to contact notes** tab to view and work with notes for the referred by/to contact.

10. Click **Close**.

Adding a new referral

The referred by/to contact is the person you receive referrals from and send referrals to. Once the referral record already exists in the system, and you have future referral business with this contact, you must select the **Add new referral** item from the action menu.

To add a new referral:

1. From the *Referred by/to details* page, click **Add new referral** from the action menu.

   The *New referral wizard* opens.

2. Select the referred contact(s) by doing one of the following:

   - search for the referred contact by selecting either the **Name** or **Address** option, then entering the corresponding search criteria in the text boxes provided. Click **Next**.
   - create a new referral contact record for your database by selecting the **Don't search. I will create new contacts** check box. Click **Next**. Create a new contact then skip to step 4. See *"Creating a contact record" on page 124*.

3. Highlight the referred contact(s) from the list, and click **Next**.

4. Select the referral direction:

   - click **Sent** if you are sending this contact to another agent.
   - click **Received** if another agent has referred this contact to you.

5. Click **Finish**.

   The *Referral details* page opens. See *"Working With Referral Details" on page 228*.

Viewing the Referral business summary

The *Referral business summary* page lets you see a breakdown of the monthly and yearly totals for your referral business.

To view the Referral business summary details:

1. From the Referral manager, click **View referral business summary** from the action menu.

   The *Referral business summary* page opens.

2. To filter the referrals being displayed, use the **Month** and **Year** drop-down lists to narrow your view.

3. Click the **Display** link (located to the right of the **Year** drop-down list). The following information is automatically summarized, based on the specified time frame:

   - **Sent**
   - **Received**
   - **Total referrals**
   - **Closed / paid**
   - **Fees paid**
   - **Fees received**
   - **Net commission on received referrals**
   - **Total of all referral income**

4. Click **View report** from the action menu to open a new browser window with the **Referral Business Summary** report. Use the browser controls to print the report. See *"Viewing And Printing Reports" on page 588*.

5. Click **Close**.

Applying an action plan to a referral

You can apply an action plan to the referred contact(s).

To apply an action plan:

1. From the Referral manager, highlight a referral record from the list.

2. Click **Apply action plan** from the action menu.

   The *Apply action plan* pop-up window opens.

3. Select the plan you want to apply from the **Available plans** list, then click **OK**.

The *Select plan start date* pop-up window opens.

4. Click the calendar icon to select a start date, then click **OK**.

Assigning a referral to another team member

If you are part of a team or partnership account, you can assign a referral to another team member.

Note: If the referral's record that you want to assign is already displayed, skip to step 2.

1. From the main menu, point to **Contacts** and then click **Referrals**.

   The *Referral manager* page opens.

2. Select the referral you want to reassign, and then click **Assign to agent** from the action menu.

   The *Select agent* page opens.

3. Select the team member you want to assign the referral to, then click **OK** from the control menu.

   The referral will appear on the *Referral manager* page with the agent's name displayed in the **Assigned to** column. Also, when the referral's record is displayed, the assigned agent's name will appear in the top right.

Viewing the sent and received referrals report

The *Sent and Received Referrals* report lets you see the details of your sent and received referrals, such as name, address, referral source, etc.

To view the Sent and Received Referrals report:

1. From the Referral manager, highlight a referral record from the list.

2. Click **View report** from the action menu.

   The *Sent and Received Referrals* report is displayed in a new browser window.

3. Use the browser window controls to print and view the report. See *“Viewing And Printing Reports” on page 588*.

Viewing your top referral sources

The *Top sources* page lets you see a list of your top referral sources, including a breakdown of commission/fees and number of referrals sent and received.

To view the Top sources page:

1. From the Referral manager, highlight a referral record from the list.
2. Click **View top sources** from the action menu.

   The *Top sources* page opens.
3. You can filter the displayed referrals by:
   - clicking the **Referral source** drop-down list and choose a source item.
   - clicking the **Referral direction** drop-down list and choose **All**, **Sent**, or **Received**.
4. Click the **Start search** link.
5. The search results are displayed in the main area of the page and shows:
   - **Referred by/to name**
   - **#Sent**
   - **Commission/Fees received**
   - **#Received**
   - **Commission/Fees sent**
6. Highlight one or more referrals from the list and then:
   - click **Send email** from the action menu to compose and send an email from the referrals area to the selected referral (with a valid email address in their contact record). See *"Sending Mass Email" on page 356*.
   - click **Add new referral** from the action menu if you need to create a new referral record. See *"Creating a referral" on page 220*.
   - click **View or edit Referred by/to details** from the action menu to view or edit the details of the agent or contact to whom the referral was sent or received.
   - click **View report** from the action menu to display the *Top Sources report* in a new browser window. See *"Viewing And Printing Reports" on page 588*.
7. Click **Close**.

Deleting a referral

You can delete a referral record, with the referral viewed or selected.

Note: If you are an assistant or are part of a team or partnership account and the **Delete referral** action menu item is unavailable, this indicates the responsible agent has not granted you deletion permissions. Contact the database owner for deletion rights.

To delete a referral record by selection:

1. From the Referral manager, highlight a referral record from the list.
2. Click **Delete referral** from the action menu.

   The *Delete referrals* dialog box opens.
3. Click **Yes** to confirm the deletion.

To delete a referral record while viewing it:

1. From the *Referral details* page of a selected referral, click **Delete referral** from the action menu.

   The *Delete referral* dialog box opens.
2. click **Yes** to confirm the deletion.

Working With Referral Details

The *Referral details* page enables you to edit referral details, send mass email, send a mailing, view reports, and more.

Viewing or editing referrals

Use the *Referral details* page to view or edit the details of the referral:

- **contact details for the referred party**
- **referral number, direction, source**
- **referral date**
- **transaction status**
- **referral fee information**
- **notes**

To view or edit a referral:

1. From the Referral manager, highlight a record from the list.
2. Click **View or edit referral** from the action menu.

   The *Referral details* page opens.
3. In the **Referred contact** section:
   - click the **Add** link to create a new contact and link them to the referral.
   - highlight a referred contact in the list and click the **View or edit** link to modify their contact record.
   - highlight a referred contact in the list and click the **Remove** link to remove the contact from the referral.

Note: This does NOT delete the contact records from the database.

4. The **Referred by / Referred to** section (depending on the referral direction), displays the referred by/to contact's name and address. Click the contact's name link to view or edit their contact record.

5. In the **Referral details** section, view or edit the following information:

    - **Referral direction** — click the drop-down list and select either **Sent** or **Received**.
    - **Referral number** — type a referral number.
    - **Referral source** — click the drop-down list and select the source of the referral, such as **Corporate relocation**, etc.
    - **Referral date** — click the calendar icon and select the date the referral was sent or received.
    - **Transaction status** — click the drop-down list and select the referral's transaction status, such as **Active**, **Pending**, **Closed**, etc.
    - **Closing date** — click the calendar icon and select the date the closing concluded for a sent referral. For a received referral this field will be automatically filled in if the closing already exists.
    - **Sale price** — type the amount of the sale price for a sent referral. For a received referral, this field will be automatically filled in if the closing already exists.
    - **Commission amount** — type the amount of the commission the agent is receiving for a sent referral. For a received referral, this field will be automatically filled in if the closing already exists.
    - **Referral fee** — select either the **Percent** or **Flat fee** option. Use the spin buttons to set the percentage of the agent's commission that the sender of the referral will receive. Or, type the dollar amount (flat fee) that the sender of the referral will receive. The percentage option will be automatically calculated based on the **Commission amount**.
    - **Check amount** — type the referral fee check amount that you have sent/received. This field should only be filled in when a referral fee check has actually been sent or received.
    - **Check sent / received date** — click the calendar icon and select the date that you sent or received the referral fee check.

6. In the **Referral notes** section:

- click the **Add new** link, then type the notes in the text field.
- click the **Pick from list** link and select from a pick list of pre-defined notes. Click **OK**.
- click the **Print notes** link to open a new browser window displaying a report of referral notes that you can print. Click the **Print** button. See *“Viewing And Printing Reports” on page 588*.
- If you have a lot of notes and want to view them in batches of ten, click the **View 10 more** link.
- To see a complete list of notes, click **View all**.

7. Click **Close**.

Performing a mail out

To perform a mail out to selected referrals:

1. From the *Referral details* page of a selected referral, click **Perform mail out** from the action menu.

   The *Perform mail out — select template* page opens. See *“Performing a mail out to a contact or group of contacts” on page 337*.

Following a referral’s progress

Once the referral status is changed, it cannot be changed again. For example if the status changes from **New** to **Listing**, and then you delete the listing, the referral’s status remains as **Listing**.

A referral always has a progress status, which can be viewed from the last column of the *Referral manager* page.

To follow-up on a referral, perform a single activity or the first activity in an action plan. If you link any of the associated contacts of the referral record to a listing or closing, or if you create a closing from a listing, the progress status of the referral changes.

- **New** — the referral has been accepted but no actions have yet been taken.
- **Followed up** — when you mark a single activity as “done” for any of the contacts attached to the referral, the progress status changes to “Followed up”, (see *“Marking An Activity Done” on page 273*).
- **Listing** — when you create a listing for any of the contacts attached to the referral, the progress status changes to “Listing”, (see *“Creating a listing” on page 455*).
- **Closing** — when you create a closing for any of the contacts attached to the referral, the progress status changes to “Closing”, (see *“Adding closing details” on page 513*).
- **Listing-Closing** — when you create a closing from the existing listing, the progress status changes to “Listing-Closing”, (see *“Turning A Listing Into A Closing” on page 503*).

Working With Plans

In this chapter:

Action, Listing And Closing Plans

When you're setting up action, listing or closing plans, you'll be performing tasks such as:

- adding an activity to a plan (for example, a **To-do** that involves putting up a sign on a new listing's property).
- modifying existing activities, (for example, assigning an activity to a different agent).
- generating a report to make a printout of all the activities that belong to a specific plan.

Action, listing and closing plans can all be applied and removed throughout Top Producer 7i. For example, listing plans will be applied in listing-related pages while closing plans will be applied in closing-related pages. For more information, see *"Applying marketing service report plans" on page 471* and *"Closing Service Plans" on page 546*.

Default plans, which are included with the program, cannot be modified or deleted. For more flexibility, create a personal plan to apply to multiple contacts. You can easily modify the activities later. See *"Copying an action, listing or closing plan" on page 239*.

Top Producer 7i comes with default action, listing and closing plans. You can also create your own plans from scratch or use a default plan from which to build and tailor a new plan from.

Note: You cannot make global changes to the activities in default action plans. Once you have applied a default action plan to several contacts, you cannot modify an activity later. It is recommended that you create a personal copy of a default plan if you anticipate making changes to the plan after it has been applied.

This section tells you how to:

- create an action, listing or closing plan (see *page 233*).
- modify an action, listing or closing plan (see *page 238*).
- copy an action, listing or closing plan (see *page 239*).
- rename an action, listing or closing plan (see *page 239*).
- delete an action, listing or closing plan (see *page 240*).
- generate an action, listing or closing plan report (see *page 240*).

For more information about setting rules for automatically applied plans, (see *"Automatically Applying Action Plans To Leads" on page 54*).

For more information about working with market report plans and closing report plans, see *"Marketing Service And Closing Report Plans" on page 242*.

Creating an action, listing or closing plan

You can create action, listing or closing plans. Each plan consists of one or more activities which can be assigned to a user. The activity will appear in the user's Today's business. For more information about Today's business, see *"Working With Today's Business" on page 256*.

To create an action, listing or closing plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Listing plans**).

3. Click **Create new** (above the **[Plan type] name** drop-down list).

   The *Create new [plan type]* pop-up window opens.

4. Type a name for your plan, then click **OK**.

   The new plan name is displayed in the **Action plan name** drop-down list, and is a personal plan.

5. The **Sort chronologically** check box is selected by default and is relevant for printing reports, working with activities in Today's business and Scheduler.

   - if the check box is selected, the activities in the list will be sorted by date order (plan start date, listing or closing date).
   - if the check box is cleared, the activities in the list will be sorted according to parent activities in an action plan, followed by their dependent sub-activities (or children).

6. To add an activity to the plan, click **Create new activity** from the action menu.

   The *Add new activity to [plan type]: [Plan name]* page opens.

7. In the **Activity type** section, specify the type of activity (for example, a **Letter**) you want to add to your plan by choosing the appropriate option button, then click **Next**.

   The *Add new [activity type] to [plan type]: [Plan name]* page opens.

8. In the top section of the window:

   - type a description in the **Description** text box. Either type the description directly in the text box or click the pick list.
   - specify the priority level in the **Priority** text box. Either type a value directly in the text box or use the spin buttons.
   - specify who the activity is assigned to by selecting an employee from the **Assign to** drop-down list.
   - specify the template you want to use by clicking the **Select [activity type] template** link.

Note: This link will only be available if the activity type is an email, letter, postcard, envelope or label.

The *Select [Mail type] template* page opens. Select the template that contains the format you want, then click **OK**.

- attach any files you want by clicking the **Attachments** link.

Note: This link will only be available if you're creating an email activity.

The *Attachments* page opens. Click **Attach file**. The *Select the file to attach* pop-up window opens. Browse for the file to attach and click **Open**. Repeat this step if you need to attach additional files.

- if you want the email to be sent automatically on the day you specify, select the **Send this email automatically** check box.

Note: This option will only be available if you are creating an email activity.

- Click the **Sort mail by** drop-down list to sort the plan activity by **Last name**, **Street name**, or **Zip code**.

Note: This option will only be available if the activity type is a letter, postcard, envelope or label.

---

9. In the **[Activity type] to be performed [#] day(s)** section, specify when the activity should occur.

   If the activity is part of an action plan, specify whether the activity should occur:

   - a certain number of days after the plan's start date by selecting the **From plan starting date** option button.
   - after a preceding activity is completed by selecting the **After preceding activity is completed** option button.

     To make sure this activity only appears in the assigned user's Today's business **after** a preceding activity has been marked done, select the **After the preceding activity is completed** option button, then select the preceding activity from the **Select preceding activity** drop-down list. (When you do this, you are creating a cascading activity.)

Note: You can only select from activities that belong to the plan you are currently working in. You will NOT be able to create a cascading activity if it's the first one in the plan.

   If the activity is part of a listing plan, specify whether the activity should occur:

   - after the listing date by selecting the **After listing date** option button.
   - before the expiration date by selecting the **Before expiration date** option button.
   - after the expiration date by selecting the **After expiration date** option button.
   - after a preceding activity is completed by selecting the **After the preceding activity is completed** option button.

     To make sure this activity only appears in the assigned user's Today's business **after** a preceding activity has been marked done, select the **After the preceding activity is completed** option button, then select the preceding activity from the drop-down list. (When you do this, you are creating a cascading activity.)

Note: You can only select from activities that belong to the plan you are currently working in. You will NOT be able to create a cascading activity if it's the first one in the plan.

If the activity is part of a closing plan, specify whether the activity should occur:

- after the acceptance date by selecting the **After acceptance date** option button.
- before the closing date by selecting the **Before closing date** option button.
- after the closing date by selecting the **After closing date** option button.
- after a preceding activity is completed by selecting the **After the preceding activity is completed** option button.

  To make sure this activity only appears in the assigned user's Today's business **after** a preceding activity has been marked done, select the **After the preceding activity is completed** option button, then select the preceding activity from the drop-down list below. (When you do this, you are creating a cascading activity.)

Note: You can only select from activities that belong to the plan you are currently working in. You will NOT be able to create a cascading activity if it's the first one in the plan.

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10. The selections you made in step 8 will be reflected in the **Perform event [#] day(s)...** field, in the **Activity dates** section. Use the spin buttons to set the number of days.

Note: The starting date is defined when the plan is applied.

---

11. To set up a reminder to occur a certain number of days before the to-do date, set the **Reminder [#] day(s) before [activity type]** field. Either type a

value directly in the text box or use the spin buttons.

Note: When the **Reminder** field is set to zero, the assigned employee will be reminded (from Today's business) to perform the activity on the same day it is scheduled to occur. Today's business is a scheduling feature available in Top Producer 7i. For more information, see *"Working With Today's Business" on page 256*.

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12. In the event that the activity is NOT completed on the scheduled date, you may want it removed from Today's business after a certain time. If so, select the **Apply drop off to Today's business** check box, then set the **Drop off [#] day(s) after [activity type] date** field.

13. In the **Move event to** section:

    - specify whether to move the activity to the previous or next business day if the activity falls on a Saturday. Select the **If event falls on Saturday** check box, then select the appropriate option button.
    - specify whether to move the activity to the previous or next business day if the activity falls on a Sunday. Select the **If event falls on Sunday** check box, then select the appropriate option button.

14. To:

    - create another activity belonging to the current plan-type, click **Enter next**.
    - save the activity and return to the *Action plans library* page, click **Finish**.

Modifying an action, listing or closing plan

To modify an action, listing or closing plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Listing plans**).

3. From the **[Plan type] name** drop-down list, select the plan you want to modify.

4. To sort activities by the time they're scheduled to occur, select the **Sort chronologically** check box.

5. To add a new activity to the plan, click **Create new activity** from the action menu.

   The *Add new activity to [plan type]: [Plan name]* page opens.

6. Specify the activity's details, then click **Finish**. For more information about how to set each field, see *"Creating an action, listing or closing plan" on page 233*.

7. To view or edit a specific activity, highlight the activity, then click **View or edit activity** from the action menu.

   The *View or edit [plan type] [activity type]: [Plan name]* page opens.

8. Modify the activity, then click **OK**. For more information about how to set each field, see *"Creating an action, listing or closing plan" on page 233*.

9. To delete an activity from the displayed plan, select the activity, then click the **Delete activity** action menu item.

   The *Delete activity* dialog box opens.

10. Click **Yes**.

Copying an action, listing or closing plan

Use the copy feature to save valuable time. You have the option to copy a plan when you want to adapt an existing plan to suit a different purpose but still retain the original plan.

For example, if you want to create a new plan, but have an existing plan that is similar to the one you want to create, use the copy feature to duplicate the plan, then make the changes to suit the individual needs of the new plan.

To copy an action, listing or closing plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* window opens.

2. Select the appropriate tab (for example, **Listing plans**).

3. From the **[Plan type] name** drop-down list, select the plan you want to copy.

4. Click **Copy**.

   The *Copy [plan type]: [Plan name]* pop-up window opens.

5. Type a name for the new plan in the **New [plan type] name** field, then click **OK**.

Renaming an action, listing or closing plan

You can NOT rename default plans. To see which plans are default, look to the top-right of the *Plans setup* page to see if the phrase **This is a default plan** appears.

To rename an action, listing or closing plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Listing plans**).

3. From the **[Plan type] name** drop-down list, select the plan you want to rename, then click **Rename**.

   The *Rename [plan type]: [Plan name]* pop-up window opens.

4. Type a new name for your plan, then click **OK**.

Deleting an action, listing or closing plan

Make sure you no longer need the plan before deleting it. When you delete a plan, all the activities that belong to the plan are also deleted. Deleted plans can NOT be retrieved.

You can NOT delete **default** plans. To see which plans are default, look to the top-right of the *Plans setup* page to see if the phrase *"This is a default plan"* appears.

To delete an action, listing or closing plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Listing plans**).

3. From the **[Plan type] name** drop-down list, select the plan you want to delete, then click **Delete**.

   The *Delete [plan type]: [Plan name]* dialog box opens.

4. Click **Yes**.

Generating an action, listing or closing plan report

Generating and printing a report is a good way to see 'the big picture' -- that is, ALL of a plan's activities, when they're scheduled to be completed by, as well as who is responsible for completing the activity. See *"Running Reports" on page 591*.

To generate an action, listing or closing plan report:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Listing plans**).

3. From the **[Plan type] name** drop-down list, select the plan you want to generate a report for.

4. Click **View report** from the action menu.

   The Top Producer 7i *Report — [plan type]* page opens in a separate browser window.

5. You can download the report in one of three formats. Select one of the file formats from the drop-down list, then click the **Download Report** link:

   - **Portable Document Format** (.pdf)

For more information about working with reports, see *"Running Reports" on page 591*.

- **Microsoft Excel Format** (.xls)
- **Plain Text Format** (.csv)

6. To print the report, click the **Print** button at the top of the page.

   The *Print* pop-up window opens.

7. Specify your print options, then click **Print**.

Marketing Service And Closing Report Plans

When you're working with marketing service and closing report plans, you can work with:

1. the report plan in its entirety (see *"Working with plans" on page 242*).
2. the individual reports that make up the plan (see *"Working with the reports in a marketing service or closing plan report" on page 245*).

Marketing service plans can be applied to listings, while closing report plans to closings. For more information about working with marketing service reports and closing reports, see *"Working With Marketing Service Reports" on page 473* and *"Closing Service Reports" on page 535*.

Working with plans

This section tells you how to:

- view or edit a plan (see *page 242*).
- create a new plan (see *page 233*).
- copy a plan (see *page 239*).
- rename a plan (see *page 244*).
- delete a plan (see *page 244*).

To view or edit a plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).
3. Select the plan you want to view or edit, then click **View or edit** from the action menu.

   The *View or edit report plan [report name]* page opens.
   From here you can manage the plan's scheduled reports, including adding a new report and modifying an existing report.

For more information, see *"Working with the reports in a marketing service or closing plan report" on page 245.*

To create a new plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Click **Create new** from the action menu.

   The *Create new report plan* pop-up window opens.

4. In the **Report plan name** field, type a new name.

5. Click **OK**.

   The *View or edit report plan [report name]* page opens.

6. From here you can manage the plan's scheduled reports, including adding a new report and modifying an existing report. For more information, see *"Working with the reports in a marketing service or closing plan report" on page 245.*

To copy a plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Select the plan you want to copy, then click **Copy** from the action menu.

   The *Copy report plan* pop-up window opens.

4. In the **Report plan name** field, type a new name (if necessary).

5. Click **OK**.

   The *View or edit report plan [report name]* page opens.

6. From here you can manage the plan's scheduled reports, including adding a new report and modifying an existing report.

For more information, see *"Working with the reports in a marketing service or closing plan report" on page 245.*

To rename a plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Select the plan you want to rename, then click **Rename** from the action menu.

   The *Rename report plan* pop-up window opens.

4. In the **Report plan name** field, type a new name.

5. Click **OK**.

   The plan is renamed.

To delete a plan:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Select the plan you want to delete, then click **Delete** from the action menu.

   The *Delete report plan* pop-up window opens.

4. Click **Yes**.

   The plan is deleted.

Working with the reports in a marketing service or closing plan report

This section tells you how to:

- add a new report to a plan (*see page 245*).
- rearrange reports in a plan (*see page 246*).
- modify an existing report (*see page 247*).
- delete an existing report (*see page 247*).

To add a new report:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Select the report plan, then click **View or edit** from the action menu.

   The *View or edit report plan: [report name]* page opens.

4. Click **Add new** from the action menu.

   The *Add new plan item* page opens.

5. In the **Report name** field, type a name for the new report.

6. From the **Assigned to** drop-down list, specify a person to assign the report to.

7. Schedule how many days, weeks or months after the previous report the new report should run. Either type a number value in **Schedule this report** field or use the spin buttons, then, from the adjacent drop-down list, select **Day(s)**, **Week(s)** or **Month(s)**.

8. Specify whether to include all activities that occurred since the previous report or since the start of the plan by selecting the appropriate option button.

To add new comments, click **Add new** from the action menu. The *Add comment* dialog box opens. Type a description, then the comments, and then click **OK**.

To set a default comment, select the comment, then click **Set as default** from the action menu.

To delete a comment, select the comment, then click **Delete**.

9. To include introductory comments or summary remarks, either type the comments in the **Introductory comments** or **Summary remarks** area, or click **Introductory comments** or **Summary remarks** to insert existing text.

   If you have selected to insert existing text, the *Insert comments/remarks* page opens.

   Select whether you want to select introductory or summary text by selecting the appropriate option button, then, in the **Comments description** area, select the text you want. Click **OK**.
   The *Add new plan item* page reopens.

10. To spell check:

    - introductory comments, click **Spell check** (top right of the **Introductory comments** area).
    - summary remarks, click **Spell check** (top right of the **Summary remarks** area).

11. Click **OK**.

    The *View or edit report plan [report name]* page reopens with the new report. See *"Viewing And Printing Reports" on page 588*.

To rearrange the order of reports:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Select the report plan, then click **View or edit** from the action menu.

   The *View or edit report plan: [report name]* page opens.

4. Select the report you want to move, then click the **Move up** or **Move down** from the action menu as many times as necessary.

To modify an existing report:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Select the report plan, then click **View or edit** from the action menu.

   The *View or edit report plan: [report name]* page opens.

4. Select the report you want to modify, then click **View or edit** from the action menu.

   The *View or edit service report plan item* window opens. For more information about the fields in this window, see *page 245.*

To delete a report:

1. Point to **Setup**, then click **Plans setup**.

   The *Plans setup* page opens.

2. Select the appropriate tab (for example, **Marketing report plans**).

3. Select the report plan, then click **View or edit** from the action menu.

   The *View or edit report plan: [report name]* page opens.

4. Select the report you want to delete, then click **Delete** from the action menu.

   The *Delete report* dialog box opens.

5. Click **Yes**.

   The report is deleted.

Working With Activities

In this chapter:

Working With The Scheduler

Top Producer 7i's comprehensive Scheduler offers a visual representation of the busy times for any given day, and enables you to schedule personal appointments and access them in daily, weekly, monthly and yearly views. To specify the settings for how the scheduler will appear each time it's displayed, see *"Setting The Scheduler Preferences" on page 106*.

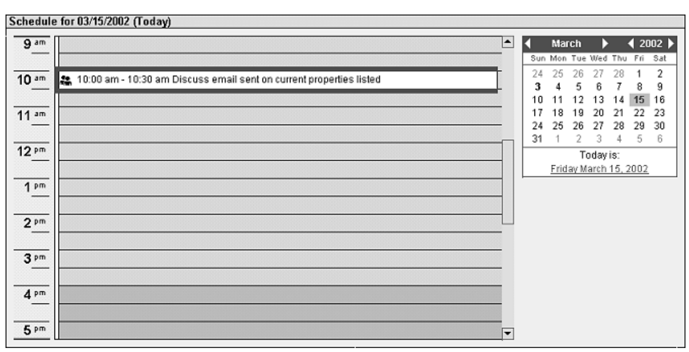
Important: Scheduled appointments or timed calls that are not linked to a contact record will be deleted from your database after one year.

If you don't want them deleted, make sure that you link them to the associated contact record when you schedule them. Doing this allows you keep a permanent database record of appointments and calls.

The Scheduler's different views

This section describes the different views available.

The Scheduler's day view

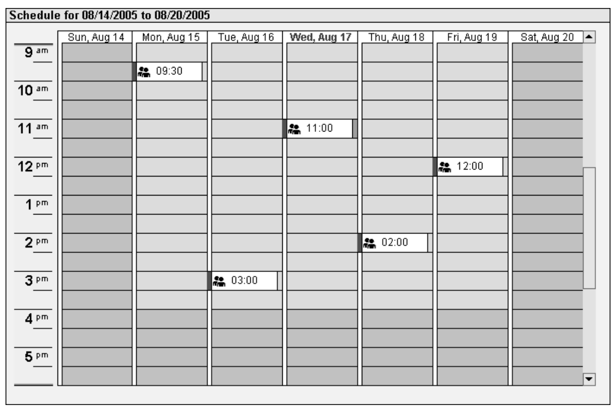


The current day (today) is displayed by default. The month calendar located to the right, lets you move to any day in the current month, simply by clicking on the desired date. Use the arrows at the top of the calendar to switch between months and years.

Using the drag and drop features in the Scheduler's day view, you can:

- move an activity earlier or later in the day by clicking and dragging the activity up or down the page.
- adjust the activity's start and end time by clicking and dragging the top and bottom edges of the activity.
- copy an activity by holding down the **[Ctrl]** key on your keyboard while clicking and dragging an activity to the desired location on the page.

The Scheduler's week view

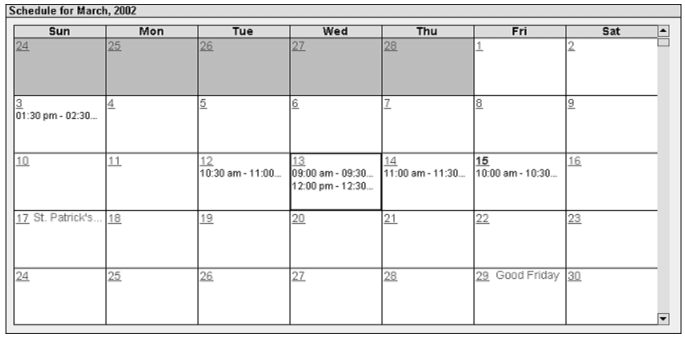


The weekly view shows Sunday through Saturday, with the current day displayed in red, bold font. Use the **<<Previous week** and **Next week>>** links located at the bottom of the page to switch to a previous or following week.

Using the drag and drop features in the Scheduler's week view, you can:

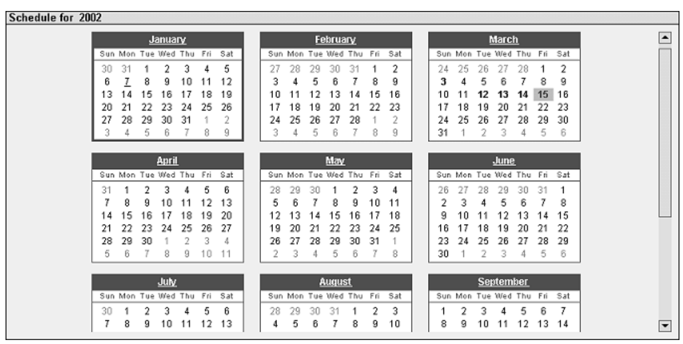
- move an activity earlier or later in the day by clicking and dragging the activity up or down the page.
- move an activity to a different day in the week by clicking and dragging the activity into another day column.
- adjust the activity's start and end time by clicking and dragging the top and bottom edges of the activity.
- copy an activity by holding down the **[Ctrl]** key on your keyboard while clicking and dragging an activity to the desired location on the page.

The Scheduler's month view



The month view looks much like a calendar, with the current day displayed in red, bold font. Use the **<<Previous month** and **Next month>>** links located at the bottom of the page to switch to a previous or following month. View activities for a specific day by clicking the appropriate number. For example, if you wanted to view the day's activities for the 6th, click the number **6** to display the day view. Click an activity to view the details.

Viewing the Scheduler's year view



The yearly view displays the selected year, bolding any days that have event(s) scheduled. The current day appears in red, bold font. Single-click any date to display the day view, or click the appropriate month to display the month view. Use the **<<Previous year** and **Next year>>** links located at the bottom of the page to switch to the previous or following year.

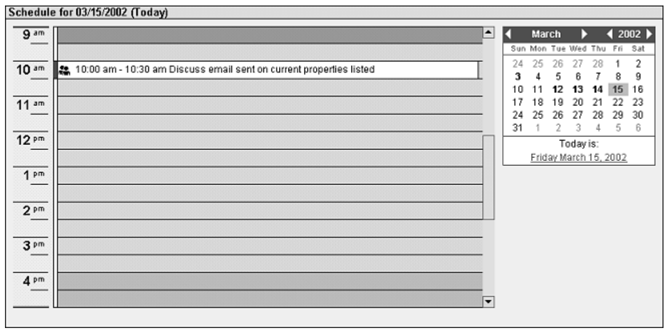
Working with the Scheduler

This section tells you how to view your schedule, manage activities from the Scheduler, print your schedule, and view another user's schedule.

Note: If you have selected the option on the *Preferences* page to allow multitasking in Top Producer 7i, you can look up schedule information while performing another task. For more information, see *"Looking up schedule information while performing another task" on page 254* and *"Setting the ability to multitask in Top Producer 7i" on page 104*.

1. Point to **Schedule** and then click **My schedule**.

   The *Schedule for [date]* page opens.



   Depending on the option you chose on the *Scheduler preferences* page, you will see either the day, week, month, or year view. For more information on specifying scheduler preferences, see *"Setting The Scheduler Preferences" on page 106*.

If either the Scheduler's day view or week view is displayed, quickly enter the time of the activity by selecting a specific block of time and clicking **Schedule an activity**, or double-clicking the appropriate time block.

2. To add an activity:

   - click **Schedule an activity** from the action menu. The *Add new activity* page opens.
   - select either the **Appointment** or **Call** option button, and then click **Next**.

Note: When adding an activity through the Scheduler, you only have the option to create an appointment or call activity. For more information on adding an appointment or call, see *page 259*.

When you complete an activity you should always be sure to mark it done. Once marked done, the activity will be added to the associated contact's history, and will no longer appear in Today's business to remind you to perform it.

3. To mark an activity done:

   - highlight the activity you want to mark done, then click **Mark done** from the action menu.

     The *Mark done* dialog box opens.
   - click **Yes**.

Note: Activities that have been marked done for more than a year are automatically moved to the History Manager.. For more information, see *"Reviewing Historical Activities" on page 278.*

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4. To modify an activity:

   - highlight the activity you want to modify.
   - click **View or edit activity** from the action menu.

     The *View or edit Contact [activity type]* page opens.
   - make your changes, then click **OK**.

Note: For more information on viewing or editing an activity from the Scheduler, see *page 259*.

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5. To delete an activity:

   - highlight the activity you want to delete.
   - click **Delete** from the action menu.

Note: You can only delete an activity from the day or week view.

   - when the *Delete activity* dialog box opens, click **Yes**. Skip to step 6.

6. To delete a *repeating* activity:

   - highlight the repeating activity you want to delete.
   - click **Delete** from the action menu.

     The *Delete repeating activity* dialog box opens.
   - click **Delete all** to delete all instances of the repeating activity

     OR

     click **Delete** to delete only this instance of the repeating activity.

7. Click the **Day view**, **Week view**, **Month view**, or **Year view** to change the currently displayed scheduler view.

Note: For more information on the different views, see *"The Scheduler's different views" on page 249*.

8. To print a daily, weekly or monthly schedule:

   - select the desired view by clicking **Day view**, **Week view** or **Month view** from the action menu.

Note: This option is not available for the yearly view.

   - click **Print schedule** from the action menu.
     The Top Producer 7i *Report -- [view type] schedule* page opens.
   - click the **Download Report** link and select one of the formats: **Portable Document Format** (.pdf); **Microsoft Excel Format** (.xls); or **Plain Text Format** (.csv).
   - click the **Print** icon at the top of the page. The *Print* pop-up window opens. Specify your print settings, then click **OK**.

For more information about how to work with this page, including the toolbar icons, see *"Viewing And Printing Reports" on page 588*.

9. To view another employee's schedule:

   - click **Select a different user** from the action menu.
     The *Select a different user* pop-up window opens.
   - use the drop-down list to select the employee's schedule you want to view.
   - click **OK**.

10. Click **Close**.

Looking up schedule information while performing another task

If you have selected the option on the Preferences page (see *page 103*) to allow multitasking in Top Producer 7i, you can look up schedule information while performing another task. This can be very useful if, for example, you are creating a listing in Top Producer 7i and a client calls asking what time their showing is. Instead of saving and closing the listing creation to look up details in the Scheduler, you can click the Scheduler icon on the main menu bar and the Scheduler will open in a separate window. Your listing file will remain open until you can resume working on it.

Note: The **Scheduler** icon will only appear if you selected the **Show quick access icon toolbar** option on the *Preferences* page (see *page 103*).

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1. Click the **Scheduler** icon on the right side of the main menu bar.

   The *Schedule for [date]* page opens in a separate window. The page you were previously working on remains open and can be accessed via the **Main page** tab along the bottom of the page.

2. View your schedule information.

3. Click **Close** to exit the Scheduler.

Working With Today's Business

Today's business provides a quick reminder about your scheduled activities and it tracks your activities for a certain length of time, depending on the activity reminder "drop off" setting. This ensures you don't forget about important tasks that you may have put on hold.

Today's business provides a numeric count of scheduled activities and gives you instant access to the activities themselves, letting you review the details of each activity one-by-one and mark them "done" as they are completed.

Important: Scheduled appointments or timed calls that are not linked to a contact record will be deleted from your database after one year.

If you don't want them deleted, make sure that you link them to the associated contact record when you schedule them. Doing this allows you keep a permanent database record of appointments and calls.

Viewing the Today's business page

This section tells you how to view a summary list of all activities for any specified day, which provides instant access to an individual activity.

To view Today's business:

1. Point to **Schedule**, **Today's business**, then click **Summary**.

   The *Today's business [today's date]* page opens.

2. To see:

   - activities for a specific date range, click the **Date range** link. Specify a date range, then click **Start search**. For more information on applying date ranges, see *"Specifying Date Ranges" on page 26.*

- activities assigned to a specific user, select the user from the **assigned to** drop-down list, then click **Start search**.

3. In the **Activities** section, click the desired activity type to view a detailed list of those activities.

4. Click **Close** to return to the main menu.

Viewing a summary report of a user's schedule

This section tells you how to view and/or print a summary report of the activities for a specified user.

To view a report:

1. Point to **Schedule**, **Today's business**, then click **Summary**.

   The *Today's business [today's date]* page opens.

2. Click **View report** from the action menu.

   The *Report options for [User name] on [Today's date]* page opens.

3. To view a report that includes:

   - new lead information AND scheduled activities for the day, select the **All activities (including leads)** option button.
   - scheduled activities for the day, select the **Daily schedule (text only)** option button.

4. Click **View report** from the control menu.

   The Top Producer 7i *Report -- Today's business* page opens.

5. You can download the report in one of three formats. Select one of the file formats from the drop-down list, then click the **Download Report** link:

   - **Portable Document Format** (.pdf)
   - **Microsoft Excel Format** (.xls)
   - **Plain Text Format** (.csv)

6. Click the **Print** icon at the top of the page.

   The *Print* pop-up window opens.

7. Specify your print settings, then click **OK**. For more information about how to work with this page, including the toolbar icons, see *“Viewing And Printing Reports” on page 588*.

Scheduling An Activity

From the *Add new activity* page, you can add appointments, calls, to-dos, emails, letters, labels, envelopes or postcards.

To schedule an activity:

1. Point to **Schedule** and then click **Schedule activity**.

   The *Add new activity* page opens.

2. If you are scheduling a call or an appointment, in the **Individual/Group activity** section, select whether this is an individual or a group activity.

   This section is available only if you are creating a call or appointment activity, and have an assistant record entered in Top Producer 7i or are subscribed to a team/partner version.

3. In the **Activity type** section, select the type of activity you want to schedule, then click **Next**.

   The *Add new [activity type]* page opens.

4. Complete the following information in the **Activity details** section:

   - enter a description in the **Description** text box. Either type the text directly in the field, or click the list icon to select a preset item.
   - enter the date in the **Date** field. Either type the date directly in the field, or click the calendar icon.
   - if you are entering a call or appointment, enter the **Start time** and **End time** by typing in each field or using the spin buttons.
     Click the **Rest of day** check box after setting the **Start time** to automatically set the **End time** to 11:59 PM.
     Click the **All day** check box to automatically set the **Start time** to 12:00 AM and the **End time** to 11:59 PM.

Note: If you set a time for a call it will appear in both My schedule and Today's business as an appointment.

- specify who the activity is assigned to by choosing a person from the **Assigned to** drop-down list.
- specify a priority level for the activity in the **Priority** text box. Either type a value directly in the field or use the spin buttons.

5. Click the **Contacts** link to associate any contact(s) with the activity.

   The *Select contacts* page opens.

6. To see:

   - a specific contact, select the type of criterion you want to search for by choosing the appropriate option button from the **Search contact by** section. Then, in the available fields below, type the corresponding item description for which to search.

     For example, if you want to search by last name, select the **Name** option button, then type "Jones" in the **Last name** text box.

     Click **Start search**.

     Click **Clear search** to clear your search criteria.

     To exclude unsubscribed contacts from the search, select the **Filter unsubscribed contacts** check box.
   - all contacts, select the **All contacts** option button. Click **Start search**.

7. To add the contact(s) to the activity, highlight the contact(s) in the **Available contacts** grid, then click **Add**.

   The contact(s) move to the **Selected contacts** grid.

8. Click **OK**.

   The *Add new [activity type]* page reopens.

9. To select a template for a correspondence item (email, letter, envelope, label or postcard):

- click the **[activity] template** link.

  The *Select [activity type] template* page opens.
- click the **List of categories** drop-down list to select a template category.
- select a template from the list.
- click **OK**.

10. To customize the content for a correspondence item (email, letter, envelope, label or postcard):

    - click the **View or edit [activity type]** link.

      The *Edit [activity type] for: [# of contacts]* page opens.
    - For more information on working with templates, see *"Customizing A Template's Content" on page 306*.

11. Click the **Sort mail by** drop-down list and select one of the mail sorting options:

    - **Last name**
    - **Street name**
    - **Zip code**

12. If you are creating an email activity and want to attach any files, such as a picture:

    - click the **Attachments** link.

      The *Attachments* page opens.
    - click **Attach file**.

      The *Select the file* page opens.
    - browse for the file you want to attach and click **Open**. Repeat this step if you need to attach more than one file.

      Your attachment, along with its size, appears in the *Attachments* page. If you've attached more than one file to your email, the combined size of all your attachments appears in the bottom left.
    - click **OK**. (To NOT save the attachment to the email and to remove the attachment from the *Attachments* page, click **Cancel**.)

      Your attachment is saved to the email and the *Add new email* page reopens.

To remove an attachment, select the attachment in the *Attachments* page, then click **Remove** (at the bottom of the page). A dialog box appears, asking if you're sure you want to remove the attachment. Click **Yes**.

Note: Attaching large files can take longer to send. You will NOT be able to send files that exceed 2 MB (megabytes).

13. If you are creating an email activity and want the email to be sent automatically on the scheduled date, rather than appearing in Today's business as a scheduled activity, select the **Send this email automatically** check box.

Note: To send an email automatically, you must select an email template, enter a description and select the recipient(s). The recipient(s) must have an email address entered in their contact record(s).

14. To link the activity to a listing or closing, in the **Link to** section:

    - specify the transaction type you want this activity linked to by selecting the appropriate option button. If you do not want this activity linked to any transaction, select **None** and skip to step 14.
    - click the **Select [transaction type] property** link to select the transaction you want the activity linked to. The *Select [transaction type]* page opens. Select the property and then click **OK**.

15. In the **Occurrence** section specify whether you want to set up a one-time activity or a repeating activity by selecting the appropriate option button. If you chose to schedule a one-time activity, skip to step 15.
    If you chose to schedule a repeating activity, click the **Setup repeating activity** link.

    The *Setup repeating activity* page opens.
    Specify:
    - whether you want this activity repeated daily, weekly, monthly, or yearly. In the **Repeat this activity...** section, choose the appropriate option button.
    - when you want this activity repeated in the **Specify how you want this activity to repeat...** section. If you chose to have the activity repeated:

        - **Daily** — choose the **Every** option button to have the activity repeated every certain number of days. Use the spin but-

tons to select the number of days in the adjacent text box.
OR
select the **Every weekday** option button to have the activity repeated every week day (Monday-Friday).

- **Weekly** — select the interval of weeks for the repeating activity by using the spin buttons, then select one or more check box(es) for each day of the week you want the activity to occur on.

- **Monthly** — choose the first option to have the activity repeat on a specific **date** of every month or month interval. Use the spin buttons to set the date and month interval. (For example, if you want the activity to be repeated on the 8th of each month, set the first text box to **8**, and the second text box to **1**.)
OR
choose the second option to have the activity repeat on a specific **day** of every month or month interval. Use the drop-down lists to select whether it is the first, second, third, fourth, or last of that day that occurs in the month. Use the spin buttons to set the monthly interval.

- **Yearly** — choose the first option to have the activity repeat on a specific **date** of each year. Use the drop-down list to set the month, and the spin buttons to set the date.
OR
choose the second option to have the activity repeat on a specific day of every year. Use the drop-down lists to set the day of the week and whether it is the first, second, third, fourth, or last of that day that occurs in the month. Select the month of the year you want the activity to occur in by choosing the appropriate option in the third drop-down list.

- Specify the date you want the first occurrence of the repeating activity to occur on. In the **Activity**

starts to repeat on... section, type the date in the text box or click the calendar icon.

- If you want the activity to stop repeating on a certain date. In the **Activity stops repeating...** section, select the **On [date]** option button, then type a date in the text box or use the calendar icon.
  OR
  if you want the activity to occur a specific number of times. In the **Activity stops repeating...** section, select the **After [#] occurrences** option button, then use the spin buttons to set the number of occurrences of the activity.
- Click **Finish**.

  The *Add new [activity type]* page reopens.

16. In the **Reminder and Drop off** section complete the following:

    - use the spin buttons to change the **Remind me** value if you want to be reminded (from Today's business) any number of days in advance.
      When the **Remind me** field is set to zero, you will be reminded (from Today's business) to perform the activity on the **same day** it is scheduled to occur.
    - if the system detects a Palm device, then you can set an alarm on your Palm device. The system must be synchronized before the alarm is displayed on the Palm device.

Note: Timed calls are treated as appointments.

For appointments, a reminder email will be sent instead. Use the drop-down list to set the amount of time in advance to be reminded. A reminder email will be sent to the account you specify.

If the system detects a Palm device, then the Palm controls are available for you to set an alarm on your Palm device. Check the box to set an alarm on your Palm device. Use the spin buttons to set the time you want to be notified before the appointment.

- if you want the activity to be removed from Today's business after a certain period of time in the event that the activity is not completed on the scheduled date, select the **Apply drop-off to Today's business** check box. Type a value directly in the **drop off** field, or use the spin buttons to select the appropriate number of days. (For example, if you set the **drop off** to **5**, you will be reminded in Today's business to perform the activity for 5 days after the activity's original date.)

When the **Drop off** is set to zero, the activity will be removed from Today's business the next day.

17. Click **Finish**.

Modifying An Activity

To modify an activity:

1. Point to **Schedule**, **Today's business**, then click the activity type you want to modify. (For example, if you want to modify an appointment, point to **Schedule**, **Today's business**, then click **Appointments**.)

   The *[Activity type] assigned to [user name] on [today's date]* page opens.

2. To see:

   - activities from a specific date range, specify the date range in the **Activities from** and **to** text boxes, or click the calendar icons. Click **Start search**.
   - activities assigned to a specific user, select the user from the **assigned to** drop-down list. Click **Start search**.

3. Highlight the activity you want to modify and then click **View or edit** from the action menu.

   The *View or edit [activity type] for [contact name]* page opens.

4. You can modify the following information in the **Activity details** section:

   - enter a description in the **Description** text box. Either type the text directly in the field or click the list icon to select a preset item.
   - enter the date in the **Date** field. Either type the date directly in the field, or click the calendar icon.
   - if you are entering a call or appointment, enter the **Start time** and **End time** by typing in each field or using the spin buttons.
     Click the **Rest of day** check box after setting the **Start time** to automatically set the **End time** to 11:59 PM.
     Click the **All day** check box to automatically set

the **Start time** to 12:00 AM and the **End time** to 11:59 PM.

Note: If you set a time for a call it will appear in both My schedule and in Today's business as an appointment.

- specify who the activity is assigned to by choosing an option in the **Assigned to** drop-down list.
- specify a priority level for the activity in the **Priority** text box. Either type a value directly in the field or use the spin buttons.

5. Click the **Contacts** link to add or remove any contact(s) that are associated with the activity.

   The *Select contacts* page opens.

6. To see:

   - a specific contact, select the type of criterion you want to search for by choosing the appropriate option button from the **Search contact by** section. Then, in the available fields below, type the corresponding item description for which to search.

     For example, if you want to search by last name, select the **Name** option button, then type "Jones" in the **Last name** text box.

     Click **Start search**.

     Click **Clear search** to clear your search criteria.

   - all contacts, select the **All contacts** option button. Click **Start search**.

To remove a contact, select the contact in the **Selected contacts** grid, and then click **Remove.** The contact moves to the **Available contacts** grid.

7. To add the contact(s) to the activity, highlight the contact(s) in the **Available contacts** grid, then click **Add**.

   The contact(s) move to the **Selected contacts** grid.

8. Click **OK**.

   The *View or edit [activity type] for [contact name]* page reopens.

9. To add a template for a correspondence item (email, letter, envelope, label or postcard):

- click the **[activity] template** link.

  The *Select [activity type] template* page opens.
- click the **List of categories** drop-down list to select a template category.
- select a template from the list.
- click **OK**.

10. To modify the content for a correspondence item (email, letter, envelope, label or postcard):

    - click the **View or edit [activity type]** link.

      The *Edit [activity type] for: [# of contacts]* page opens.
    - For more information on working with templates, see *"Customizing A Template's Content" on page 306*.

11. Click the **Sort mail by** drop-down list and select one of the mail sorting options:

    - **Last name**
    - **Street name**
    - **Zip code**

12. If you are creating an email activity and want to attach any files, such as a picture:

    - click the **Attachments** link.

      The *Attachments* page opens.
    - click **Attach file**.

      The *Select the file* page opens.
    - browse for the file you want to attach and click **Open**. Repeat this step if you need to attach more than one file.

      Your attachment, along with its size, appears in the *Attachments* page. If you've attached more than one file to your email, the combined size of all your attachments appears in the bottom left.
    - click **OK**. (To NOT save the attachment to the email and to remove the attachment from the *Attachments* page, click **Cancel**.)

      Your attachment is saved to the email and the *Add new email* page reopens.

To remove an attachment, select the attachment in the *Attachments* page, then click **Remove** (at the bottom of the page). A dialog box appears, asking if you're sure you want to remove the attachment. Click **Yes**.

Note: Attaching large files can take longer to send. You will NOT be able to send files that exceed 2 MB (megabytes).

13. If you are creating an email activity and want the email to be sent automatically on the scheduled date, rather than appearing in Today's business as a scheduled activity, select the **Send this email automatically** check box.

Note: To send an email automatically, you must select an email template, enter a description and select the recipient(s). The recipient(s) must have an email address entered in their contact record(s).

14. To link the activity to a listing or closing, in the **Link to** section:

    - specify the transaction type you want this activity linked to by selecting the appropriate option button. If you do not want this activity linked to any transaction, select **None** and skip to step 15.
    - click the **Select [transaction type] property** link to select the transaction you want the activity linked to. The *Select [transaction type]* page opens. Select the property and then click **OK**.

15. In the **Occurrence** section specify whether you want to set up a one-time activity or a repeating activity by selecting the appropriate option button.
    If you chose to schedule a one-time activity, skip to step 16.
    If you chose to schedule a repeating activity, click the **Setup repeating activity** link.

    The *Setup repeating activity* page opens.
    Specify:
    - whether you want this activity repeated daily, weekly, monthly, or yearly. In the **Repeat this activity...** section, choose the appropriate option button.
    - when you want this activity repeated in the **Specify how you want this activity to repeat...** section. If you chose to have the activity repeated:

        - **Daily** — choose the **Every** option button to have the activity repeated every certain number of days. Use the spin but-

tons to select the number of days in the adjacent text box.
OR
select the **Every weekday** option button to have the activity repeated every weekday (Monday-Friday).

- **Weekly** — select the interval of weeks for the repeating activity by using the spin buttons, then select one or more check box(es) for each day of the week you want the activity to occur on.

- **Monthly** — choose the first option to have the activity repeat on a specific <u>date</u> of every month or month interval. Use the spin buttons to set the date and month interval. (For example, if you want the activity to be repeated on the 8th of each month, set the first text box to **8**, and the second text box to **1**.)
OR
choose the second option to have the activity repeat on a specific <u>day</u> of every month or month interval. Use the drop-down lists to select whether it is the first, second, third, fourth, or last of that day that occurs in the month. Use the spin buttons to set the monthly interval.

- **Yearly** — choose the first option to have the activity repeat on a specific <u>date</u> of each year. Use the drop-down list to set the month, and the spin buttons to set the date.
OR
choose the second option to have the activity repeat on a specific <u>day</u> of every year. Use the drop-down lists to set the day of the week and whether it is the first, second, third, fourth, or last of that day that occurs in the month. Select the month of the year you want the activity to occur in by choosing the appropriate option in the third drop-down list.

- Specify the date you want the first occurrence of the repeating activity to occur on. In the **Activity**

starts to repeat on... section, type the date in the text box or click the calendar icon.

- If you want the activity to stop repeating on a certain date, in the **Activity stops repeating...** section, select the **On [date]** option button, then type a date in the text box or use the calendar icon.
  OR
  if you want the activity to occur a specific number of times, in the **Activity stops repeating...** section, select the **After [#] occurrences** option button, then use the spin buttons to set the number of occurrences of the activity.
- Click **Finish**.

  The *Add new [activity type]* page reopens.

16. In the **Reminder and Drop off** section complete the following:

- use the spin buttons to change the **Remind me** value if you want to be reminded (from Today's business) any number of days in advance.
  When the **Remind me** field is set to zero, you will be reminded (from Today's business) to perform the activity on the **same day** it is scheduled to occur.
- if the system detects a Palm device, you can set an alarm on your Palm device. The system must be synchronized with the Palm device before the alarm is displayed.

Note: Timed calls are treated as appointments.

For appointments, a reminder email will be sent instead. Use the drop-down list to set the amount of time in advance to be reminded. A reminder email will be sent to the account you specify.

If the system detects a Palm device, then the Palm controls are available for you to set an alarm on your Palm device. Check the box to set an alarm on your Palm device. Use the spin buttons to set the time you want to be notified before the appointment.

- if you want the activity to be removed from Today's business after a certain period of time in the event that the activity is not completed on the scheduled date, select the **Apply drop-off to Today's business** check box. Type a value directly in the **drop off** field, or use the spin buttons to select the appropriate number of days. (For example, if you set the **drop off** to **5**, you will be reminded in Today's business to perform the activity for 5 days after the activity's original date.)

When the **Drop off** is set to zero, the activity will be removed from Today's business the next day.

17. Click **Finish**.

Marking An Activity Done

When you complete an activity you should always mark it done. Once marked done, the activity will be added to the associated contact's history and will no longer appear in Today's business.

Note: Activities that have been marked done for more than a year are automatically moved to the History Manager. For more information, see *"Reviewing Historical Activities" on page 278*.

If the activity is linked to a listing or closing, you can add it to the service report when you have completed it, see *"Working With Marketing Service Reports" on page 473*; or *"Closing Service Reports" on page 535*.

To mark an activity done:

1. Point to **Schedule**, **Today's business**, then click the activity type you want to view. (For example, if you want to view all appointments, highlight **Schedule**, **Today's business**, then click **Appointments**.)

   The *[Activity type] assigned to [user name] on [today's date]* page opens.

2. To see:

   - activities from a specific date range, specify the date range in the **Activities from** and **to** text boxes, or click the calendar icons. Click **Start search**.
   - activities assigned to a specific user, select the user from the **assigned to** drop-down list. Click **Start search**.

3. To mark an activity done:

   - highlight the activity you want to mark done, then click **Mark done** from the action menu.
   - when the *Mark done* dialog box is displayed, click **Yes**.

Note: If the activity is a listing or closing type activity, the *Add activity to service report* dialog box opens. For more information, see *page 274*.

4. Click **Close**.

To mark a listing/closing activity as done and add it to the service report:

1. Point to **Schedule**, **Today's business**, then click the activity type you want to view. (For example, if you want to view all appointments, highlight **Schedule**, **Today's business**, then click **Appointments**.)

   The *[Activity type] assigned to [user name] on [today's date]* page opens.

2. To see:

   - activities from a specific date range, specify the date range in the **Activities from** and **to** text boxes, or click the calendar icons. Click **Start search**.
   - activities assigned to a specific user, select the user from the **assigned to** drop-down list. Click **Start search**.

3. To mark an activity done:

   - highlight the activity you want to mark done, then click **Mark done** from the action menu.
   - when the *Mark done* dialog box is displayed, click **Yes**.

4. If the selected activity is linked to a listing or closing, the *Add activity to service report* dialog box opens. To add this activity to the listing or closing service report, click:

   - **Yes** (or **Yes to all** for multiple activities)
   - **No** (or **No to all** for multiple activities)

   The *Add activity for [property address]* pop-up window opens.

5. Complete the following:

   - **Description** — type the activity's description; or click the list icon to select from the pick list.
   - **Date** — click the calendar icon to specify the date the activity was completed.

- **Time** — use the spin buttons to specify the time the activity was completed.
- **Cost** — enter the cost of the activity.
- **Details** — type the details in the text box; or click the link to select from the pick list.

6. Click **OK**.

   The service report is updated.

Deleting An Activity

This section tells you how to delete one-time activities and repeating activities.

To delete an activity:

1. Point to **Schedule**, **Today's business**, then click the activity type you want to view. (For example, if you want to view all appointments, highlight **Schedule**, **Today's business**, then click **Appointments**.)

   The *Activities assigned to [User name]* page opens.

2. To see:

   - activities from a specific date range, specify the date range in the **Activities from** and **to** text boxes, or click the calendar icons. Click **Start search**.
   - activities assigned to a specific user, select the user from the **assigned to** drop-down list. Click **Start search**.

3. To delete an activity:

   - highlight the activity you want to remove.
   - click **Delete** from the action menu.
   - when the *Delete activity* dialog box opens, click **Yes**.

4. To delete a repeating activity:

   - highlight the repeating activity you want to remove.
   - click **Delete** from the action menu.
     The *Delete repeating activity* dialog box opens.
   - click **Delete all** to delete all instances of the repeating activity
     OR
     click **Delete** to delete only this instance of the repeating activity.

5. Click **Close**.

Reviewing Historical Activities

The History Manager feature provides a place to search, view, and delete all of your completed, archived activities from a single location within Top Producer 7i

An automated archiving service regularly checks the completion date of your completed activities and moves those more than a year old to the History Manager section. This action is taken for two reasons:

- Removing long-finished activities from the My Schedule, Today's Business, and Contacts areas significantly improves system performance.
- Consolidating historical activities in a single area makes it easier for you to find or delete old activities.

From within the History Manager, you can search for and display old activities and delete activities individually or in batches.

> **Note:** Historical activities are moved from their original locations, not copied. After archiving they appear only in the History Manager section.
>
> Contact records and contact history reports will display the number of historical activities associated with the contact, but will not display information about the activities themselves.

Finding historical activities

To find a historical activity

1. From the **Schedule** menu, click **History Manager**.
2. Use the **Assigned to** and **Activity type** drop-down list boxes to define the agent and activity type to which the activity belongs.

   Both fields can also be set to a value of Any.

3. Define a date range by either manually entering dates in the **Activites completed from** and **to** fields or by clicking the calendar icons and defining the dates using the calender display.

   The date ranges can be left blank or open-ended in either direction.

4. Click **Display** to display the matching historical activities.

5. Once the activities are displayed, sort the screen by clicking the **Date**, **Activity**, or **Plan** column heads. Double-click an activity's row to display the activity detail.

Note: Historical activities are displayed in read-only mode. You cannot edit a historical activity or reassign it to a contact.

Deleting historical activities

To delete historical activities

1. From the **Schedule** menu, click **History Manager**.

2. Display the activities you want to delete. See *"Finding historical activities" on page 278*.

3. Select the specific activities you want to remove:

   - Click the **Select all** link to select every activity on the screen.
   - Hold down the CTRL key while using the mouse to selected multiple rows. Release the CTRL key when finished.

4. Click **Delete** to permanently remove the activities from the system.

Scheduling A Meeting

If you have assistants entered in Top Producer 7i, or are part of a team or partnership account, you can schedule a meeting and invite other team members to attend. When scheduling a meeting, select a timed activity type (i.e., an appointment or a timed call).

To schedule a meeting:

1. From the **Schedule** menu, click **Schedule activity**.
2. From the *Add new activity* page, select the **Call** or **Appointment** option button, and then click **Next**.
3. Select the **Group activity attendees** option button.
4. To select the team members you want to invite to the meeting, complete the following:

   a) Click the **Group activity attendees** link.

   b) From the *Add or remove attendees* page, click **Add** to select attendees.

   c) From the *Add attendees* dialog box, select the team members you want to attend the meeting.

   d) Click **OK**.

Note: Solid blue blocks under a specific time indicate the adjacent user is busy during that time.

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5. Enter the meeting's **Description** and **Date**.

Note: Along with a short description of the meeting, you may want to enter the meeting's location in the **Description** field.

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6. Specify the meeting's time by completing the following:

- Enter the meeting's **Start time** and **End time**.
- If the meeting will take the entire day, select the **All day** check box.
- If the meeting will take the rest of the day, select the **Rest of day** check box, and then specify the meeting's **Start time**.

7. To select any contacts that you want to apply the meeting to, complete the following:

    a) Click the **Contacts** link.

    b) Select the contact(s) from the **Available contacts** grid, then click **Add**.

    The contact(s) move to the **Selected contacts** grid.
    To modify the list of contacts to choose from, use the **Search Contact By** options to specify your search criteria. To exclude unsubscribed contacts, select the **Filter unsubscribed contacts** check box.

    c) Click **OK**.

8. To attach a document to the meeting request:

    a) Click **Attachments** from the action menu.

    b) From the *Attachments* page, click **Attach file**.

    c) From the *Select the file* page, browse for the file you want to attach and click **Open**. Repeat this step if you need to attach more than one file.

    Your attachment, along with its size, appears in the *Attachments* page. In addition, the total size of all attachments appears in the bottom left.

    d) Click **OK**.

9. If the meeting is related to a listing or closing, you can link the meeting to it.

    a) In the **Link to** section, use the option buttons to select whether to link this activity to a **Listing** or **Closing**.
    The **Select [listing/closing] property** box

displays the listing or closing this activity is currently linked to.

b) To choose a different listing or closing with which to associate this activity, click the **Select [listing/closing] property** box.

c) Select the listing or closing you want to link this activity to and click **OK**.

Once the meeting activity has been marked done, it will appear on the appropriate service report.

10. To set up a repeating activity, in the **Occurrence** section click **Repeating**, and then click the **Setup repeating activity** link to specify the recurrence pattern. For more information on specifying repeating activity details, see *step 15 on page 269*.

Note: This option is only available when **None** is selected in the **Link to** section.

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11. To set reminders for the meeting:

a) Select the **Remind me** check box.

b) Use the drop-down list box to set the amount of time in advance to be reminded.

c) Enter the email address where you want the reminder sent.

A reminder email will be sent to the account you specify, in the time zone specified in Agent Setup. For more information, see *“Specifying agent information” on page 35*.

d) If the system detects a Palm device, you can set a reminder on your Palm device. Use the spin buttons to select the time you want to be notified before the appointment.

Note: The system must be synchronized before the alarm is displayed on the Palm device.

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12. Click **Enter next** to schedule another meeting, or click **Finish**.

Responding To A Meeting Request

If a partner or team member has invited you to a meeting, you should respond and let the meeting organizer know if you will attend.

To respond to a meeting request:

1. From the **Schedule** menu, click **My schedule**.
2. From the *Schedule* page, select the meeting.
3. From the action menu, click **View or edit activity**.
4. From the *View or edit [activity type]* page, select one of the following from the **Meeting status** section to determine if you're going to attend the meeting:
   - **Accept:** Indicates you will attend the meeting.
   - **Tentative:** Indicates you are interested in attending the meeting, but aren't sure you'll be able to make it.
   - **Decline:** Indicates you can't attend the meeting.
5. Click **OK**.

   The meeting organizer can see if you're attending the meeting by viewing the activity in their Schedule.

Viewing Who Will Attend A Scheduled Meeting

If you've scheduled a meeting for your partner/team members, you can view who will be attending the meeting from My schedule.

To view meeting attendees:

1. From the **Schedule** menu, click **My schedule**.
2. From the *Schedule* page, click either **Day view** or **Week view** from the action menu.
3. Select the day the meeting is scheduled for by doing any of the following:
    - If the Day view is displayed, from the calendar on the right side of the page, select the day the meeting is scheduled for.
    - If the Week view is displayed, if necessary, use the **«Previous week** and **Next week»** links until the meeting is in view.
4. Select the meeting and then click the **View or edit activity** action menu item.
5. Click **Group activity attendees**.

   The attendees' status is displayed on the left side of the page in the **Status** column. In addition, a solid blue block indicates the user has accepted your meeting invite.

Modifying A Meeting's Details

If you have scheduled a meeting for your partners/team members, you can update meeting details, if necessary.

To modify a meeting's details:

1. From the **Schedule** menu, click **My schedule**.
2. From the *Schedule for [date]* page, select the meeting.
3. From the action menu, click **View or edit activity**.
4. From the *View or edit [activity type]* page, modify the activity's details. For more information, see *step 4 on page 280*.
5. To notify all attendees of the change, from the control menu click **Send update**.

   A notification email will be sent to all attendees. In addition, all changes will appear in the attendees' Schedule.
6. To save the meeting's details without sending an update, click **OK** from the control menu, and then choose one of the following:
   - If you didn't add or remove attendees from the meeting, click **OK** to save the changes without sending an update.

     All changes will appear in the attendees' Schedule, and a notification email will not be sent.
   - If you did add or remove meeting attendees, you will need to send out a notification email. Click **Yes** to send the update now.

Working With Service Reports From Today's Business

Any service reports assigned to a Top Producer 7i user to print or email will appear in Today's business. This section tells you how to work with service reports from Today's business, including how to:

- view service reports (see *page 286*).
- print service reports (see *page 287*).
- publish a service report to the web AND send an email with a link to where the published report is displayed (see *page 287*).
- mark a service report-related activity done (see *page 289*).
- view the listing/closing associated with a service report (see *page 290*).
- view or edit a service report (see *page 290*).
- add an activity to the listing/closing associated with the service report (see *page 291*).
- delete a service report (see *page 291*).

To view service reports:

1. Point to **Schedule**, then **Today's business**, and then click **Service reports**.

   The *Service reports assigned to [user name] on [date]* page opens.

2. To only see service reports:

   - created on a certain date or within a date range, set the two date fields. Either type the date(s) or click the calendar icon(s).
   - assigned to a specific user, select the user from the drop-down list.

3. Click **Start search**.

All of the service reports assigned to the selected user on the specified date or within the specified date range appear below.

To print a service report:

1. Select the service report you want to print, then click **Print** from the action menu.

   The *Print* pop-up window opens.

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

   The *Mark done* dialog box opens.

3. If you:

   - want to mark the report as done, click **Yes**.
   - do NOT want to mark the report as done, click **No**.

   If you marked the report as done, it disappears from Today's business.

To publish a service report to the web AND send an email with a link to where the published report is displayed:

1. Select the service report you want to publish to the web, then click **Publish and send** from the action menu.
   If you have:

   - set up your customer web pages, the report is published to the web and the *Send service report link* page opens. Go to step 2.
   - NOT set up your customer web pages, the *Create customer web page* dialog box opens. To set up your customer web pages now, click **Yes**. For more information about setting up customer web pages, see *"Setting Up My Customer Web Pages" on page 62*.

2. In the *Send service report link* page, instead of typing a new email, you may use one of the pre-written email templates. From the **Category** drop-down list, select a template category. From the **Template** drop-down list, select the template. Click **Use this template**.

   An email subject appears in the **Subject** field and the email's text appears.

3. Either type the addresses for the email recipients in the **To** field or click the link to search for a contact that is already in your system.

4. If you want to attach any files, such as a picture, click **Attachments**.

   The *Attachments* page opens.

5. Click **Attach file**.

   The *Select the file* page opens.

6. Browse for the file you want to attach and click **Open**. Repeat this step if you need to attach more than one file.

   Your attachment, along with its size, appears in the *Attachments* page. In addition, the total size of all attachments (this includes one or more attachments) appears in the bottom left.

7. Click **OK**. (To NOT save the attachment to the email and to remove the attachment from the *Attachments* page, click **Cancel**.)

   Your attachment is saved to the email and the *Send service report link* page reopens.

Note: Attaching one or more large files can take longer to send. You will NOT be able to send a file that exceeds 2 MB (megabytes). In addition, if you are sending more than one file, the combined size of all files must not exceed 2 MB.

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8. To:

   - include an email signature, select the **Include signature** check box.
   - include a picture merge code, click the location within the body of the email that you want the merge code inserted, then click **Insert picture merge code**. For more details, see *"To insert a picture merge code:" on page 363*.
   - insert a merge code, click the location within the body of the email that you want the merge code inserted, then click **Insert merge code**. The *Insert merge code* pop-up window opens. Select a merge code and click **OK**.

- insert a link to the published service report, click the **Insert service report** link.
- insert a marketing link, click the location within the body of the email that you want the marketing link inserted, then click **Insert link**. The *Select marketing link* page opens. Select the marketing link, then click **OK**.
- clear the email message and start again, click **Clear message**.

9. Click **Next**.

   The *View or edit email for [contact name] on [property address]* page opens.

10. If necessary, modify the email and then click **Send**.

    The *Mark done* dialog box opens.

11. If you:

    - want to mark the report as done, click **Yes**.
    - do NOT want to mark the report as done, click **No**.

    If you marked the report as done, it disappears from Today's business. However, the report is still accessible from the **Scheduled reports** tab of the listing or closing record. For example, if the service report is associated with a listing and is marked done, the service report can be found in the **Scheduled reports** tab of the *Listing details for [seller's name]* page. In addition, the service report is accessible from the record of the associated contact.

    For more information about working with listings, see *"Working With Listings" on page 454.*

    For more information about working with closings, see *"Working with Closings" on page 509.*

    For more information about working with contact, see *"Managing Contacts" on page 121.*

To mark a service report-related activity done:

Once the service report is printed or emailed, you should mark it done.

1. Select the service report(s) with the activity, such as printing, that you want to mark done. (You may select more than one service report.)

2. Click the **Mark done** from the action menu.

The *Mark done service report* dialog box opens.

3. Click **Yes**.

   The *Saving history* dialog box opens. This indicates that the service report is being saved in the associated contact's record, as well as the associated listing/closing record.

   Once the service report information is saved, the dialog box closes and the report disappears from Today's business. However, the report is still accessible from the **Scheduled reports** tab of the listing or closing record. For example, if the service report is associated with a listing and is marked done, the service report can be found in the **Scheduled reports** tab of the *Listing details for [seller's name]* page. In addition, the service report is accessible from the record of the associated contact.

   For more information about working with listings, see *"Working With Listings" on page 454.*

   For more information about working with closings, see *"Working with Closings" on page 509.*

   For more information about working with contact, see *"Managing Contacts" on page 121.*

To view the listing/closing associated with a service report:

1. Select the service report associated with the listing/closing you want to view, then click **View listing/closing** from the action menu.

   Depending on whether the service report is associated with a listing or closing, the *Listing details for [seller name] or Closing details for [buyer name]* page opens.

   For more information about working with listings, see *"Working With Listings" on page 454.*

   For more information about working with closing, see *"Working with Closings" on page 509.*

To view or edit a service report:

1. Select the service report you want to view or edit, then click **View or edit** from the action menu.

   Depending on whether the service report is for a listing or closing, the *Marketing report plans* or *Closing report* *plans* page opens.

For more information about working with marketing service reports, see *"Working With Marketing Service Reports" on page 473*.

For more information about working with closing service reports, see *"Closing Service Reports" on page 535*.

To add an activity to a service report:

1. Select the service report you want to add an activity to, then click **Add activity** from the action menu.

   The *Add activity for [address]* pop up window opens.

2. Enter:

   - the activity's description by typing in the **Description** field or click the list icon to select a preset item.
   - enter the activity's date by typing in the **Date** field or clicking the calendar icon.
   - enter the time of the activity by typing in the **Time** field or by using the spin buttons.
   - enter the total cost it took to perform the activity by typing a value in the **Cost** field.
   - enter any details for the activity by typing in the **Details** section or click the **Details** link to select a preset item.
   - click **OK**.

3. Repeat step 2 for each activity you need to add to the service report.

To delete a service report:

1. Select the service report(s) you want to delete, then click **Delete** from the action menu.

   The *Delete scheduled report* dialog box opens.

2. Click **Yes**.

   The selected reports are deleted.

Managing Mail

In this chapter:

Using The Communication Library

You can produce highly professional correspondence and marketing materials by using Top Producer 7i's built-in communication templates.

The Communication library contains an extensive selection of templates that you can use "as is" or customize to reach any demographic segment. The use of merge codes and the word processing tools, give you the flexibility to personalize and customize your correspondence.

You can perform single or mass mailouts for any number of contacts and manage all of your correspondence from one location — the Communication library.

This chapter will address working with letters, envelopes, labels and postcards. The other components of the Communication library will be dealt with in their own chapters.

Accessing the communication library

There are two ways to access the Communication library.

To access the communication library:

1. Point to either **Setup** or **Mail**, then click **Communication library**.
2. Select the tab of the type of correspondence you want to work with:
   - **Letters**
   - **Email messages**
   - **Envelopes**
   - **Labels**
   - **Postcards**
   - **Flyers**
   - **Presentations**
   - **Marketing links**

Working With Template Categories

Default vs. personal categories

All mail templates are stored within categories to assist you in keeping them organized. You can add your own categories to store and manage all of your personalized letters, envelopes, labels, and postcards. These are called personal categories and you have the flexibility of renaming and deleting them. When you select a personal category, you will see the following sentence next to the drop-down list: **This is a personal category**.

Default categories are included with the program and you cannot rename or delete them, nor can you rename or delete the templates within default categories. When you select a default category, you will see the following sentence next to the drop-down list: **This is a default category**.

Viewing categories

To see a list of available categories:

1. Click the tab of the type of correspondence you want to work with, such as letters.

2. Click the **List of categories** drop-down list to choose from all of the available categories. The type of category you have selected (default or personal) is indicated to the right of the drop-down list.

   The templates contained within the selected category are shown in the list.

3. To sort the mail templates, click the heading (or the small black arrow) to sort the templates in ascending or descending order.

Creating a new category

To create your own template category:

1. From the *Communication library* page, click the tab of the type of mailing you want to work with.

2. Click the **Add** link above the **List of categories** drop-down list.

The *Create new category* pop-up window opens.

3. Type the name of the new category and click **OK**.

Renaming a category

To rename a template category:

1. Select a personal category from the **List of categories** drop-down list.

> **Note:** You cannot rename default categories. If you try to rename a default category, the *Cannot rename this category* message box opens. Click **OK**.

2. Click the **Rename** link above the drop-down list.

   The *Rename [category name] category* pop-up window opens.

3. The current name of the category appears highlighted in the text box. Type the new name for the category and click **OK**.

Deleting a category

To delete a template category:

1. Select a personal category from the **List of categories** drop-down list.

> **Note:** You cannot delete default categories. If you try to delete a default category, the *Cannot remove this category* message box is displayed. Click **OK**.

2. Click the **Delete** link above the drop-down list.

   The *Delete [category name] category* dialog box opens.

3. Click **Yes** to confirm the deletion.

   The selected category and all of its contents are deleted.

Creating A New Template

There are two ways to access the *New [mail type] template* page. These instructions assume you are working with the Communication Library.

Top Producer 7i gives you the flexibility of the built-in word processor to work with page elements, and you can add links and merge codes to personalize your template with specific information retrieved from the database.

New letter templates

To create a new letter template:

1. Point to **Mail**, then click:
   - **Create new template**, then click **Letter**; or
   - **Communication library**, then click the **Letters** tab. Click **Create new** from the action menu.

   The *New letter template* page opens in editing mode.

2. Do the following:
   - Use the built-in word processor to work with the content of your new template. See *"Using the word processor" on page 306*.
   - Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture into the template. A pick list of merge codes opens, for you to select from.
   - Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item. A pick list of merge codes opens for you to select from.
   - Click **Insert marketing link** if you want to merge a marketing link into this template. The *Select marketing link* page opens for you to select the link from.

3. Click **Save** or **OK**.

   The *Save template* pop-up window opens.

4. Select a personal category from the drop-down list in which you want to save the new template.

5. Type a name for the new template in the text box, and then click **OK**.

6. Click **Print** from the control menu to send this new template to the printer. The *Print* pop-up window opens, letting you set your printer options.

New email templates

To create a new email template:

1. From the main menu, point to **Mail**, then click:

   - **Create new template**, then click **Email**; or
   - **Communication library**, then click the **Email messages** tab. Click **Create new** from the action menu.

   The *New email template* page opens in editing mode.

2. Do the following:

   - Enter a description in the **Subject** text box.
   - Use the large editing area to type the body of your email message (which will be in HTML).

   > **Note:** HTML mode allows you to add pictures and picture merge codes to your email template. As you cannot create a new Email template in **Plain text** mode, the **Preferences** icon will not be visible on the toolbar. See *"Using the HTML Editor" on page 359*.

   - Click the **Insert merge code** link if you want to merge a specified string of contact information. See *"Inserting pictures, text, and marketing links" on page 314*.
   - Click the **Insert picture merge code** link if you want to insert a picture merge code or a picture into the body of your email message (available in HTML mode only).
   - Click **Insert marketing link** if you want to merge a marketing link URL into the email template.

3. Click **OK**.

   The *Save template* pop-up window opens.

4. Select a personal category from the drop-down list in which you want to save the new template.

5. Type a name for the new template in the text box, and then click **OK**.

New envelope, label, and postcard templates

To create a new [Envelope/Label/Postcard] template:

1. Point to **Mail**, then click:
   - **Create new template**, then click **[Envelope/Label/Postcard]**; or
   - **Communication library**, then click the **[Envelopes/Labels/Postcards]** tab. Click **Create new** from the action menu.

   The *Select [Envelope/Label/Postcard] size* pop-up window opens.

2. Select the size of the mailing template you want to create and click **OK**.

   > **Note:** The *Select [envelope/label/postcard] size* window displays all of the sizes available. Custom sizes are not supported.

   The *New [Envelope/Label/Postcard] template* page opens in editing mode.

3. Do the following:
   - Click the **Insert text box** toolbar icon to insert a text box into the template. You must do this before you are able to type the body of your [envelope/label/postcard]. See *"Working with text" on page 315*.
   - Use the built-in word processor to work with the content of your new template. See *"Using the word processor" on page 306*.
   - Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture into the template. A pick list of merge codes opens, for you to select from.
   - Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item. A pick list of merge codes opens for you to select from.
   - Click **Insert link** if you want to merge a marketing link into this template.

     The *Select marketing link* page opens for you to select the link from, (see *"Working With Marketing Links" on page 449*).

4. Click **Save** or **OK**.

   The *Save template* pop-up window opens.

5. Select a <u>personal</u> category from the drop-down list in which you want to save the new template.

6. Type a name for the new template in the text box, and then click **OK**.

7. Click **Print** from the control menu to send this new template to the printer.

   The *Print* pop-up window opens, letting you set your printer options.

New flyer templates

To create a new Flyer template:

1. Point to **Mail**, then click:

   - **Create new template**, then click **Flyer**; or
   - **Communication library**, then click the **Flyers** tab. Click **Create new** from the action menu.

   The *Input the count of properties* pop-up window opens.

2. Use the spin buttons to set the number (to a maximum of 30), then click **OK**.

   The *New flyer template* page opens in editing mode.

3. Do the following:

   - Click the **Insert text box** toolbar icon to insert a text box into the template. You must do this before you are able to type the body of your flyer. See *"Working with text" on page 315*.
   - Use the built-in word processor to work with the content of your new template. See *"Using the word processor" on page 306*.
   - Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture into the template. A pick list of merge codes opens, for you to select from.
   - Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item. A pick list of merge codes opens for you to select from.
   - Click **Insert marketing link** if you want to merge a marketing link into this template. The *Select marketing link* page opens for you to select the link from.

4. Click **Save** or **OK**.

   The *Save template* pop-up window opens.

5. Select a personal category from the drop-down list in which you want to save the new template.

6. Type a name for the new template in the text box, and then click **OK**.

7. Click **Print** from the control menu to send this new template to the printer.

   The *Print* pop-up window opens, letting you set your printer options.

New presentation templates

To create a new Presentation template:

1. Point to **Mail**, then click **Communication library**.

2. Click the **Presentations** tab.

3. Click **Create new** from the action menu.

   The *Create new template* pop-up window opens.

4. Select the template type by choosing one of the available option buttons.

5. Click the **Select the category you want to save this template into** drop-down list and choose a personal category.

6. Type a name for the new presentation template in the text box, and click **OK**.

   The *Pages in [template name] template* page opens, but will remain empty until you add some pages.

Working with pages in a presentation template

Once you have created and named a new presentation template, you need to create new pages, add or edit existing pages from other templates, and decide on page order.

- Any pages in the presentation template are displayed in the order in which you add them. To rearrange the order of the pages, select one or more pages then click the **Move up** or **Move down** links.

Creating a new presentation page

1. From the *Pages in [template name] template* page, click **Create new** from the action menu.

The *Create new page in [template name] template* page opens.

2. Type the body of your page in the large text box.

3. Click the hyperlinks at the bottom of the page to insert text and picture merge codes. See *"Inserting pictures, text, and marketing links" on page 314.*

4. Use the built-in word processor to format text, work with graphics, and more. See *"Working with text" on page 315*.

5. Click the **Insert comparables** link if you want to display comparables on the current page:

   - from the *Insert comparables* pop-up window, select a comparable type from the drop-down list box.
   - click an option button to select the page layout for the comparables, then click **OK**.
   - a frame representing the comparable information now appears on the page. Click and drag from the middle of the frame to move it. You can resize the frame by clicking and dragging the square "handles" around the inner border.

6. Click the **View or edit comparable** link.

   The *Edit comparable* page opens.

7. Make any necessary changes to comparables you have already added to the current page. If you are viewing or editing a page that displays more than one comparable, click to select the desired comparable to work with before making changes.

   - use the word processor to make changes to the comparable. See *"Using the word processor" on page 306*.
   - click **Insert picture merge code** if you want to automatically merge a picture when printing the presentation for a contact. A pick list of merge codes will appear for you to select from, such as **CMA.listings.picture**.
   - click **Insert merge code** if you want to merge a piece of information when printing this item for a contact. A pick list of merge codes will appear for you to select from, such as **CMA.listings.area**.
   - click **Change page size** from the action menu to display the *Change page size* pop-up window. Use

the spin buttons to set the height and width, and number of rows and columns of comparables, then click **OK**.

- click **Close** when finished.

8. From the *Create new page in [template name] template* page, you can click, drag and drop comparables up and down or from side to side (depending on the selected layout) to change the order in which they are displayed on the page.

9. Click **Insert picture merge code** if you want to automatically merge a picture when printing this item for a contact or contacts. A pick list of merge codes will appear for you to select from, such as **Property.map_directions**.

10. Click **Insert merge code** if you want to merge a piece of contact or agent information when printing this item for a contact or contacts. A pick list of merge codes will appear for you to select from, such as **Agent.address**.

Note: When inserting a merge code into a text box, if the merged information exceeds the size of the text box, the text box will not be resized automatically. The result is that merged information can later appear to be “missing” from the page. You must manually resize the text box to accommodate the merged information.

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11. Click **OK**.

12. If you clicked **OK**, type a name for the new page in the *Create new page in [template name] template* pop-up window, then click **OK**.

Adding pages from a presentation template

1. From the *Pages in [template name] template* page, click **Add from template** from the action menu.

   The *Add pages from a template* page opens.

2. Click the **Select category** and **Select template** drop-down list boxes to select both the category and template that contain the desired page.

3. Select the page you want to use from the list, and click **OK**.

The page will be copied into your presentation template.

Setting page stationery

1. From the *Pages in [template name] template* page, highlight the page from the list that you want to apply page stationery to.

2. Click **Set page stationery** from the action menu.

   The *Set page stationery* pop-up window opens.

3. Choose one of the option buttons:

   - **Apply cover page stationery to this page**
   - **Apply normal page stationery to this page**
   - **Don't apply stationery to this page**

4. Click **OK**.

Customizing pages and adding theme graphics

1. From the *Pages in [template name] template* page, highlight the page from the list that you want to create customized stationery for.

2. Click **Customize stationery** from the action menu.

   The *Customize stationery for this template* page opens. It has two tabs:
   - **Cover page**
   - **Presentation page**

3. Click the hyperlinks at the bottom of the page to insert text and picture merge codes, and a theme graphic. See *"Working with text" on page 315* and *"Working with pictures" on page 315*.

4. Click the **Insert theme graphic** hyperlink at the bottom of the page to add a graphic to your stationery.

   The *Insert theme graphic* pop-up window opens.

5. Select one of the prepared themes from the drop-down list box.

6. Choose either the **Color** or **Grayscale** option button.

7. Click **OK**.

8. Use the built-in word processor to format text, work with graphics, and more. See *"Using the word processor" on page 306*.

9. Click **OK**.

Renaming a presentation page

1. From the *Pages in [template name] template* page, highlight the page from the list that you want to rename.

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

   The *Rename [page name] page in [template name] template* dialog box opens.

3. Type a new name for the page, then click **OK**.

Deleting a presentation page

1. From the *Pages in [template name] template* page, highlight a page in the list that you want to remove.

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

   The *Delete page(s)* dialog box opens.

3. Click **Yes**.

New marketing link templates

To create a new Marketing links template:

1. Point to **Mail**, then click **Communication library**.

2. Click the **Marketing links** tab.

3. Click **Create new** from the action menu.

   The *New marketing link* page opens.

4. Do the following:

   - Use the **Enter the URL or web site address for this link** field to specify the URL for the marketing link.
   - Use the **Enter the new marketing text for this link** text box to type the text that will appear for this marketing link when it is inserted into a document.
   - Use the **Enter a description for this link** text box to type a description for the marketing link.

5. Click **OK**.

   The *Save template* pop-up window opens.

6. Do the following:

   - use the **Select the category you want to save this template into** drop-down list to choose an personal category.
   - Enter a name in the **Type in the name of this template** field, then click **OK**.

   See *“Managing Marketing Links” on page 448*.

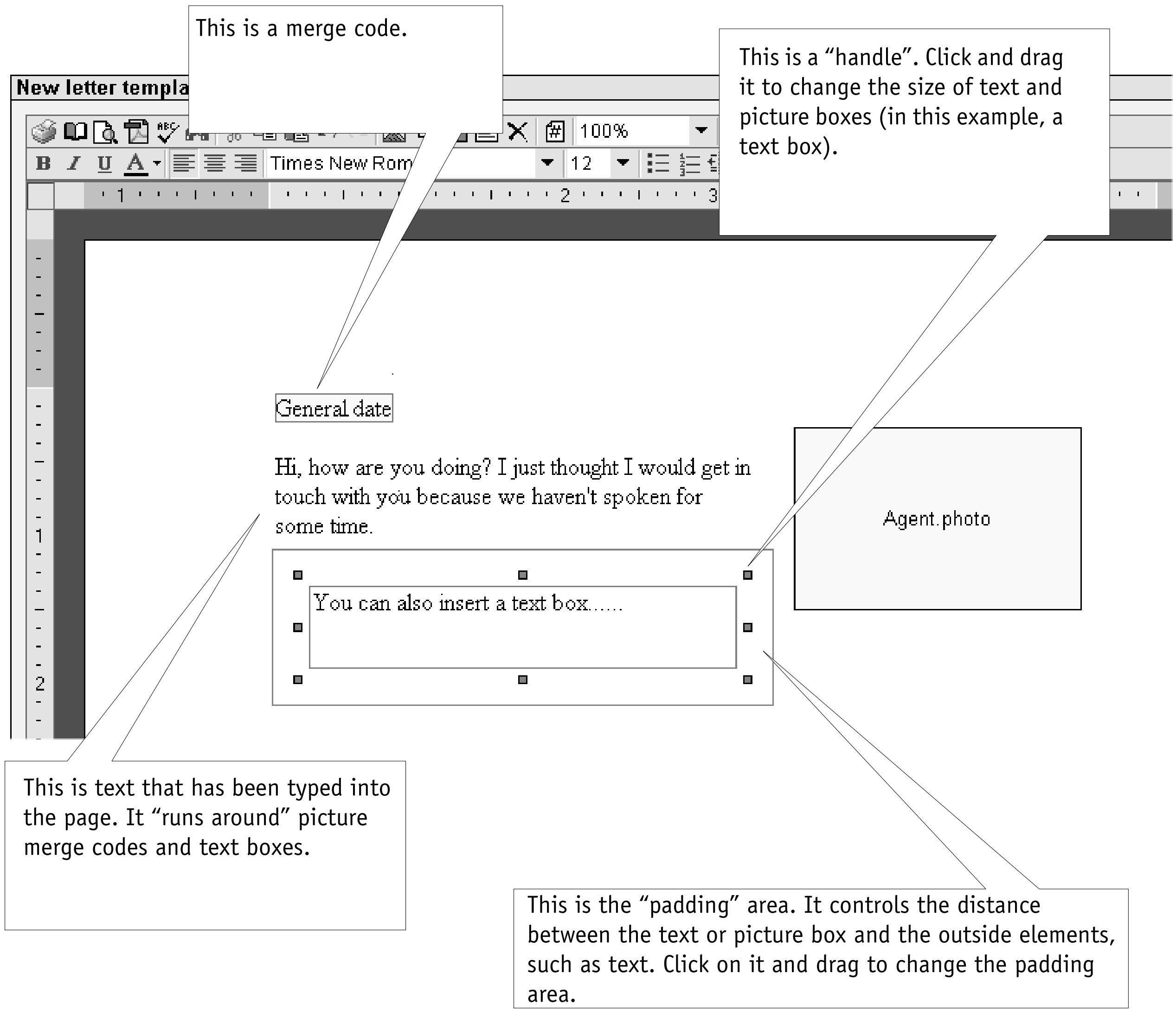
Customizing A Template's Content

This section describes how to use the built-in word processor, work with picture and text merge codes, and set up rulers and guidelines.

Using the word processor

The word processor is used to create or edit letters, envelopes, labels, postcards, presentations and flyers (it is not used for email). You can print these materials or save them in Portable Document Format (PDF).

Here is an example of merge codes and picture/text boxes:



Word Processor Commands

The word processor's toolbar functions are described below.

In addition to the toolbar functions, the word processor also includes:

- a convenient right-click menu that enables you to quickly cut, copy, paste, and delete selected text.
- standard Windows keyboard shortcuts, for example, **[CTRL]** + **U** to underline, **[CTRL]** + **C** to copy, etc.
- shortcut keys that allow you to insert symbols into your document, for example, **[CTRL]** + **[ALT]** + **[T]** will display the ™ symbol, and **[CTRL] + [ALT] + [R]** will display the ® symbol.

The edit bars at the top of the page allow you to control the appearance of the text and other objects on the page.

Top Toolbar

Print — set up your printer and paper options

Page setup — define paper size and margins

Print preview — view a letter before printing (not for templates

Save as PDF file — save in Adobe PDF format

Spelling — run the spell checker on your document

Find and replace — search for and replace text

Cut, Copy, and Paste — edit selected text

Undo/Redo — undo or redo your last operation

Insert picture from file — add a picture into your document

Bring to front, Send to back — send selected overlapping elements backwards or forwards

Insert text box — add text into your document

Delete object — remove selected text or picture

Insert page numbers — add page numbers to letters and presentations and set the alignment and format

Zoom — change the viewing size of the document

Insert hyperlink — add hyperlinks into the document

Set color properties — define and add flood fill color to a selected element.

All borders — specify which borders are visible

Border line weight — specify the thickness of the border lines

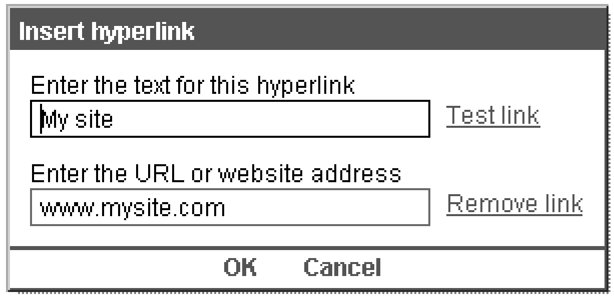
Border line style — set the border line style

Preferences — set ruler and guideline preferences

Inserting a hyperlink

1. Click the **Insert hyperlink** toolbar icon to insert a hyperlink into the document.

The *Insert hyperlink* pop-up window opens.



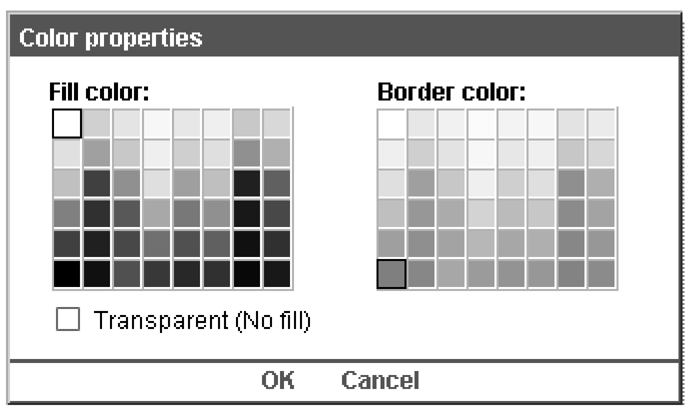
2. Type the text you want to appear in the document in the **Enter the text for this hyperlink** field.

3. Enter the Web address for the site in the **Enter the URL or web site address** field.

4. You can test that the Web address is valid by clicking **Test link**.

Setting color properties

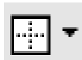
1. Click the **Set color properties** icon to select the fill or border color of selected objects.



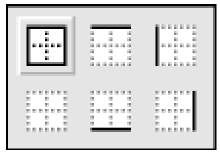
2. Select the desired fill or border colors from the respective menus.

   - Select the **Transparent (no fill)** check box if you want the object to be transparent.

Setting borders



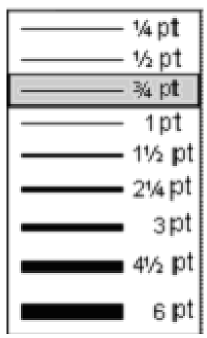
1. Click the **All borders** icon to determine which borders of the selected text or image box are visible or invisible. By default, all border are turned <u>on</u>.



2. Select one of the six border options to toggle that option on or off. For example, click the **Top** and **Right** border buttons to make the top and right borders invisible. Click the buttons again to make them visible.

Setting border line weight

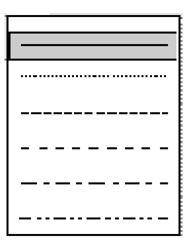
1. Click the **Border line weight** icon to adjust the weight of the borders of the selected text or image box.



2. Select the desired weight for the border.

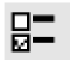
Setting border line style

1. Click the **Border line style** icon to adjust the style of the border of the selected text or image box.

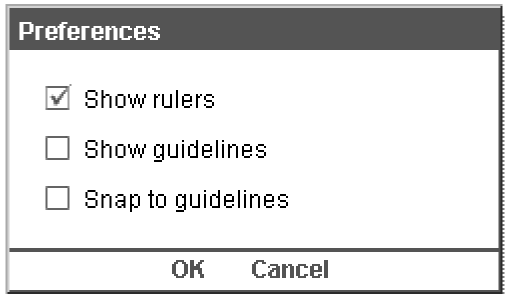


2. Select the desired line style for the border.

Setting preferences



1. Click the **Preferences** icon to set ruler and guideline preferences.



2. Select one or more of the following check box(es):

 - **Show rulers** to display rulers.
 - **Show guidelines** to display guidelines.
 - **Snap to guidelines** to have objects automatically align themselves with the guidelines.

 For more information, see *"Using Rulers" on page 312*, *"Using Guidelines" on page 313*, and *"Using Snap" on page 313*.

Bottom Toolbar


Bold, Italic, Underline — text formatting attributes


Font color — click the arrow and select text color


Align left, Center, Align right — text alignment settings

Font type — click the arrow and change text font

Font size — click the arrow and change text size


Bullets — create a bulleted list from selected text

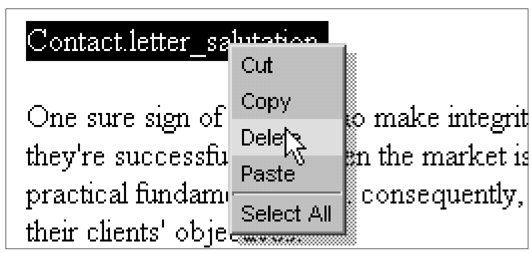

Numbered list — create a numbered list


Increase indent, Decrease indent — change text indent from the margin (in 0.5 inch increments)


Insert page break — insert a page break in the document

Using The Mouse

You can right-click on selected areas of text or objects to **cut**, **copy**, **paste** or **delete** text or merge codes.

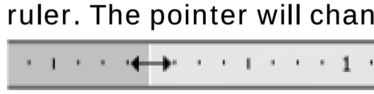


Using Rulers

Rulers provide an easy method to view and adjust the page margins and guidelines.

- To turn the rulers on, click the **Preferences** icon and select the **Show rulers** check box. See *"Inserting a hyperlink" on page 308*.

  The dark areas at the ends of each ruler display the margins.

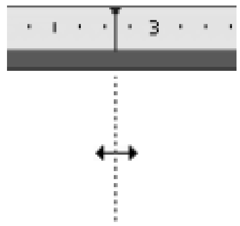
- To adjust a margin, move the mouse pointer over the margin line on the ruler. The pointer will change to a double-ended arrow. 

  Simply move the arrow pointer to change the margin.

Using Guidelines

Guidelines provide an aid to placing objects on the page. They consist of a dotted line drawn across the page, either horizontally or vertically.

- To turn guidelines on, click the **Preferences** icon and select the **Show guidelines** check box. See *“Inserting a hyperlink” on page 308*.
- Move the mouse pointer over a ruler and click to insert a guideline.



- To adjust a guideline, move the mouse pointer over the guideline. The pointer will change to a double-ended arrow. Simply move the arrow pointer to adjust the guideline.
- To remove a guideline, move the mouse pointer over the guideline marker on the ruler. The pointer will change to a double-ended arrow. Click with the mouse button to remove the guideline.

Using Snap

Snap automatically aligns objects such as text and image boxes with guidelines. To turn on snap, click the **Preferences** icon and select the **Snap to guidelines** check box, (see *“Inserting a hyperlink” on page 308*).

When you move a text box or other object close to the guideline, it will automatically snap into alignment.

Inserting pictures, text, and marketing links

The *New [mail type] template* page has three links at the bottom of the page. Use these links to insert merge codes for text and pictures, and to insert the URL or web site address for marketing links.

To insert a picture into your new template:

1. Click the **Insert picture merge code** link if you want to insert a picture automatically when printing this item for one or more contacts.

2. A pick list of available merge codes is displayed for you to choose from. Examples include **[Agent.company_logo]** or **[Agent.photo]**. Select from the list and click **OK**. For information on using pick lists, see *"List Icons" on page 23*.

To insert specified strings of text into your new template:

1. Click the **Insert merge code** link if you want to insert a specified string of contact information automatically when printing this item for one or more contacts.

2. A pick list of merge codes is displayed for you to choose from. The specified data is retrieved from the database. Examples include **[Agent.address]** or **[Closing.closing date]**. Select from the list and click **OK**.

Note: If a merge code is inserted into a text box, if the merged information exceeds the size of the text box, the text box will not be resized automatically. The result is that merged information can later appear to be "missing" from the page. You must manually resize the text box to accommodate the merged information.

To insert a marketing link into your new template:

1. Click **Insert link** if you want to insert a marketing link URL or web site address automatically when printing this item for one or more contacts.

   The *Select marketing link template* page opens.

2. Choose a link from the list and click **OK**. See *"Working With Marketing Links" on page 449*.

Working with text

If you are creating a new envelope, label, postcard, or flyer template, you must first insert a text box by clicking the toolbar icon.

To add text into a text box on a new template:

1. Size the text box by clicking and dragging the handles on the border of the box.
2. Click inside the text box to place your cursor, then type the required text.
3. Use the word processor to modify your template. Note that to modify text, you must highlight the text first, then click the desired toolbar button.
4. When you are finished editing the content of your template, click **Save** or **OK**.

   The *Save template* pop-up window opens.
5. Use the **Select the category you want to save this template into** drop-down list to choose a personal category in which to save the new template.
6. Type a name for the new template.
7. Click **OK**.

Working with pictures

To insert a picture into your new template:

1. Click the **Insert picture from file** toolbar icon.

   The *Open* pop-up window opens.
2. Navigate to the picture file you want to insert, then click **Open**.
3. Use the **Bring to front/Send to back** toolbar icons to position your graphic in front of, or behind other elements.
4. When you are finished, click **Save** or **OK**.

   The *Save template* pop-up window opens.
5. Use the **Select the category you want to save this template into** drop-down list to choose a personal category in which to save the new template.

6. Type a name for the new template.

7. Click **OK**.

Printing new mail templates

You have the option to print new letter, envelope, label, postcard, and flyer templates from the control menu.

To print a new mail template to preview it:

1. From the *New [mail type] template* page, click **Print** from the control menu at the bottom of the page.

   The *Print* pop-up window opens.

2. Customize your print job using the various options, then click **OK**.

Working With The Letter Library

Top Producer 7i comes pre-loaded with an expandible library of default letter templates. These letters — which have primarily been written for use in assigned action plans — can also be used “as is,” or modified in terms of content and design to suit your needs. You can also create your own customized letters and store them in your personal letter library.

Viewing or editing letter templates

You can view, edit, copy, rename, and delete existing letter templates.

To view a selected letter template:

1. From the **Letters** tab, select the category in which the letter template you want to view, belongs.

2. The letter templates that are part of the selected category, are listed on the page. Click the **Letter name** heading (or the little black arrow) to sort the letter templates in ascending or descending order.

3. Highlight the letter template in the list, then click **View or edit** from the action menu.

   The text of the selected letter template is displayed in the *View or edit template [template name] from category [category name]* page.

4. The letter template will display merge codes, such as **General.date**, **Contact.name**, or **Contact.company**. When you print the letter, the merge codes will be automatically replaced with actual information from your database.

To edit a selected letter template:

1. From the **Letters** tab, select the category in which the letter template you want to edit, belongs.

2. Highlight the letter template in the list, then click **View or edit** from the action menu.

The text of the selected letter template is displayed in the *View or edit template [template name] from category [category name]* page.

3. Use the built-in word processor to edit the letter template. See *"Using the word processor" on page 306*.

4. Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture when printing this item for one or more contacts.

   A pick list of merge codes opens, for you to select from.

5. Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item.

   A pick list of merge codes opens for you to select from.

6. Click **Insert link** if you want to merge a marketing link into this template.

   The *Select marketing link* page opens for you to select the link from. See *"Working With Marketing Links" on page 449*.

7. Click **Save** or **OK**.

8. Click **Print** from the control menu to send this modified template to the printer.

   The *Print* pop-up window opens, letting you set your printer options.

Copying letter templates

Copying templates is a good idea when you want to personalize a default letter template.

To copy a selected letter template:

1. From the **Letters** tab, select the category in which the letter template you want to copy, belongs.

2. Highlight the letter template in the list, then click **Copy** from the action menu.

   The *Copy template [template name] from [category name] category* pop-up window opens.

3. Specify a new letter template name in the text box, or accept the existing name with a (**1**) appended to the name.

4. Select the category to which you want to copy the letter template to, and click **OK**.

Renaming letter templates

You can rename your personal letter templates.

To rename a selected letter template:

1. From the **Letters** tab, select the category in which the letter template you want to rename, belongs.

> **Note:** You cannot rename default templates. If you try to rename a default template, the *Cannot rename* message box is displayed. Click **OK**.

2. Highlight the letter template in the list, then click **Rename** from the action menu.

   The *Rename [template name] template in [category name] category* pop-up window opens.

3. Specify a new name for the letter template in the text box, then click **OK**.

Deleting letter templates

You can delete your personal letter templates.

To delete a selected letter template:

1. From the **Letters** tab, select the category in which the letter template you want to delete, belongs.

> **Note:** You cannot delete default templates. If you try to delete a default template, the *Cannot delete* message box opens. Click **OK**.

2. Highlight the letter template in the list, then click **Delete** from the action menu.

   The *Delete [template name] template from [category name] category* message box opens.

3. Click **Yes** to confirm the deletion.

> **Note:** Since you cannot retrieve letter templates that have been deleted, make absolutely

sure that you no longer need the template before deleting it.

Print for contact(s)

For instructions on printing the selected letter for a contact, see *"Print for contact(s)" on page 320*.

Working With The Envelope Library

Top Producer 7i comes with a library of standard envelope sizes that you can use to print envelopes to accompany your mailouts. You can also create your own customized envelopes and store them in your personal envelopes library.

Viewing or editing envelope templates

You can view, edit, copy, rename, and delete existing envelope templates.

To view a selected envelope template:

1. From the **Envelopes** tab, select the category, in which the envelope template you want to view belongs.

   The envelope templates that are part of the selected category, are listed on the page.

2. Click the **Envelope name** heading (or the little black arrow) to sort the envelope templates in ascending or descending order.

3. Highlight the envelope template in the list, then click **View or edit** from the action menu.

   The selected envelope template is displayed in the *View or edit template [template name] from category [category name]* page.

4. The envelope template will display merge codes, such as **Contact.first_name**, **Contact.last_name**. When you print the envelope, the merge codes will automatically be replaced with the actual user information from your database.

To edit a selected envelope template:

1. From the **Envelopes** tab, select the category in which the envelope template you want to edit, belongs.

2. Highlight the envelope template in the list, then click **View or edit** from the action menu.

   The envelope template is displayed in the *View or edit template [template name] from category [category name]* page.

3. Use the built-in word processor to edit the envelope template. *See* *"Using the word processor" on page 306*.

4. Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture when printing this item for one or more contacts.

   A pick list of merge codes opens, for you to select from.

5. Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item.

   A pick list of merge codes opens for you to select from.

6. Click **Insert link** if you want to merge a marketing link into this template.

   The *Select marketing link* page opens for you to select the link from. See *"Working With Marketing Links" on page 449*.

7. Click **Save** or **OK**.

8. Click **Print** from the control menu to send this modified template to the printer.

   The *Print* pop-up window opens, letting you set your printer options.

Copying envelope templates

It is a good idea to make a copy of a default envelope template if you want to personalize it.

To copy a selected envelope template:

1. From the **Envelopes** tab, select the category in which the envelope template you want to copy, belongs.

2. Highlight the envelope template in the list, then click **Copy** from the action menu.

   The *Copy template [template name] from [category name] category* pop-up window opens.

3. Specify a new envelope template name in the text box, or accept the existing name with a (**1**) appended to the name.

4. Select the category to which you want to copy the envelope template to, and click **OK**.

Renaming envelope templates

You can rename your personal envelope templates.

To rename a selected envelope template:

1. From the **Envelopes** tab, select the category in which the envelope you want to rename, belongs.

> **Note:** You cannot rename default templates. If you try to rename a default template, the *Cannot rename* message box opens. Click **OK**.

2. Highlight the envelope template in the list, then click **Rename** from the action menu.

   The *Rename [template name] template in [category name] category* pop-up window opens.

3. Specify a new name for the envelope template in the text box.

4. Click **OK**.

Deleting envelope templates

You can delete your personal envelope templates.

To delete an envelope template:

1. From the **Envelopes** tab, select the category in which the envelope template you want to delete, belongs.

Note: You cannot delete default templates. If you try to delete a default template, the *Cannot delete* message box opens. Click **OK**.

2. Highlight the letter template in the list, then click **Delete** from the action menu.

   The *Delete [template name] template from [category name] category* message box opens.

3. Click **Yes** to confirm the deletion.

Print for contact(s)

Once you have printed your mail out letters, print envelopes to accompany them. Or, if preferred, print the addresses on a sheet of labels. For more information, see *"Print for contact(s)" on page 328*.

For instructions on printing the selected envelope for a contact, see *"Printing Envelopes" on page 341.*

Working With The Label Library

Top Producer 7i comes with a library of standard Avery™ label sizes that you can use to print envelopes to accompany your mailouts. You can also create your own customized labels and store them in your personal label library.

Viewing or editing label templates

You can view, edit, copy, rename, and delete existing label templates.

To view a selected label template:

1. From the **Labels** tab, select the category in which the label template you want to view, belongs.

   The label templates that are part of the selected category are listed on the page.

2. Click the **Label name** heading (or the little black arrow) to sort the label templates in ascending or descending order.

3. Highlight the label template in the list, then click **View or edit** from the action menu.

   The label is displayed in the *View or edit template [template name] from category [category name]* page.

4. The label template will display merge codes, such as **Contact.first_name**, **Contact.last_name**, or **Property.address**. When you print the label, the merge codes will be automatically replaced with the actual contact information from your database.

To edit a selected label template:

1. From the **Labels** tab, select the category in which the label template you want to edit, belongs.

2. Highlight the label template in the list, then click **View or edit** from the action menu.

The label template is displayed in the *View or edit template [template name] from category [category name]* page.

3. Use the built-in word processor to edit the label template. *See* *"Using the word processor", on page 306*.

4. Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture when printing this item for one or more contacts.

   A pick list of merge codes opens, for you to select from.

5. Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item.

   A pick list of merge codes opens for you to select from.

6. Click **Insert link** if you want to merge a marketing link into this template.

   The *Select marketing link* page opens for you to select the link from. See *"Working With Marketing Links", on page 449*.

7. Click **Save** or **OK**.

   The *Save template* pop-up window opens.

8. Select a category from the drop-down list in which you want to save the new label template.

9. Type a name for the new label template in the text box, and then click **OK**.

10. Click **Print** from the control menu to send this modified template to the printer.

    The *Print* pop-up window opens, letting you set your printer options.

Copying label templates

It is a good idea to make a copy of a default label template, if you want to personalize it.

To copy a selected label template:

1. From the **Labels** tab, select the category in which the label template you want to copy, belongs.
2. Highlight the label template in the list, then click **Copy** from the action menu.

   The *Copy template [template name] from [category name] category* pop-up window opens.
3. Specify a new label template name in the text box, or accept the existing name with a (**1**) appended to it.
4. Select the category to which you want to copy the label template to, and click **OK**.

Renaming label templates

You can rename a personal label template.

To rename a selected label template:

1. From the **Labels** tab, select the category in which the label template you want to rename, belongs.

> **Note:** You cannot rename default templates. If you try to rename a default template, the *Cannot rename* message box opens. Click **OK**.

2. Highlight the label template in the list, then click **Rename** from the action menu.

   The *Rename [template name] template in [category name] category* pop-up window opens.
3. Specify a new name for the label template in the text box.
4. Click **OK**.

Deleting label templates

You can delete personal label templates.

To delete a selected label template:

1. From the **Labels** tab, select the category in which the label template you want to delete, belongs.

Note: You cannot delete default templates. If you try to delete a default template, the *Cannot delete* message box opens. Click **OK**.

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2. Highlight the label template in the list, then click **Delete** from the action menu.

   The *Delete [template name] template from [category name] category* message box opens.

3. Click **Yes** to confirm the deletion.

Print for contact(s)

Printing labels is easy with the library of standard Avery label sizes.

For instructions on printing labels for a contact, see *"Printing Labels" on page 341*

Working With The Postcard Library

Top Producer 7i comes with a library of standard postcard sizes that you can use to quickly create a mail out on standard card stock. You can also create your own customized postcards and store them in your personal postcard library.

Viewing or editing postcard templates

You can view, edit, copy, rename, and delete existing postcard templates.

To view a selected postcard template:

1. From the **Postcards** tab, select the category in which the postcard template you want to view belongs.

   The postcard templates that are part of the selected category, are listed on the page.

2. Click the **Postcard name** heading (or the little black arrow) to sort the postcard templates in ascending or descending order.

3. Highlight the postcard template in the list, then click **View or edit** from the action menu.

   The postcard template is displayed in the *View or edit template [template name] from category [category name]* page.

4. The postcard template will display merge codes, such as **Contact.letter_salutation**, **Contact.name**, or **Listing.address**. When you print the postcard, the merge codes will be automatically replaced with actual information from your database.

To edit a selected postcard template:

1. From the **Postcards** tab, select the category in which the postcard template you want to edit belongs.

2. Highlight the postcard template in the list, then click **View or edit** from the action menu.

   The postcard template is displayed in the *View or edit template [template name] from category [category name]* page.

3. Use the built-in word processor to edit the postcard template. *See* *"Using the word processor", on page 306*.

4. Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture when printing this item for one or more contacts.

   A pick list of merge codes opens, for you to select from.

5. Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item.

   A pick list of merge codes opens for you to select from.

6. Click **Insert link** if you want to merge a marketing link into this template.

   The *Select marketing link* page opens for you to select the link from. See *"Working With Marketing Links", on page 449*.

7. Click **Save** or **OK**.

   The *Save template* pop-up window opens.

8. Select a category from the drop-down list in which you want to save the new postcard template.

9. Type a name for the new postcard template in the text box, and then click **OK**.

10. Click **Print** from the control menu to send this new template to the printer.

    The *Print* pop-up window opens, letting you set your printer options.

Copying postcard templates

It is a good idea to make a copy of a default postcard template, if you want to personalize it.

To copy a selected postcard template:

1. From the **Postcards** tab, select the category in which the postcard template you want to copy, belongs.

2. Highlight the postcard template in the list, then click **Copy** from the action menu.

   The *Copy template [template name] from [category name] category* pop-up window opens.

3. Specify a new postcard template name in the text box, or accept the existing name with a (**1**) appended to the name.

4. Select the category to which you want to copy the postcard template to, and click **OK**.

Renaming postcard templates

You can rename your personal postcard templates.

To rename a selected postcard template:

1. From the **Postcards** tab, select the category in which the postcard template you want to rename, belongs.

   Note: You cannot rename default templates. If you try to rename a default template, the *Cannot rename* message box opens. Click **OK**.

2. Highlight the postcard template in the list, then click **Rename** from the action menu.

   The *Rename [template name] template in [category name] category* pop-up window opens.

3. Specify a new name for the postcard template in the text box.

4. Click **OK**.

Deleting postcard templates

You can delete your personal postcard templates.

To delete a selected postcard template:

1. From the **Postcards** tab, select the category in which the postcard template you want to delete, belongs.

   Note: You cannot delete default templates. If you try to delete a default template, the *Cannot delete* message box opens. Click **OK**.

2. Highlight the postcard template in the list, then click **Delete** from the action menu.

   The *Delete [template name] template from [category name] category* message box opens.

3. Click **Yes** to confirm the deletion.

Print for contact(s)

Printing postcards is easy with the library of standard postcards. You can also create your own customized postcard and store them in your personal postcards library.

For instructions on printing the selected postcard for a contact, see *"Printing Postcards" on page 342.*

Working With The Flyer Library

Top Producer 7i comes with a large library of attractive and customizable flyers that cover all the standard prospecting and marketing themes: **Just Listed**, **Just Sold**, **Open House**, **Agent Open**, **Multiple Listings**, **Priced To Sell**, **Price Reduction**, etc., as well as service-related themes, and many more you can print or add to prospecting action plan email.

These instructions assume you are working from the Communication library. For more information on working with flyers, see *"Working With The Flyer Library" on page 378*.

Viewing or editing flyer templates

You can view, edit, copy, rename, and delete existing flyer templates.

To view a selected flyer template:

1. From the **Flyers** tab, select the category in which the flyer template you want to view, belongs.

   The flyer templates that are part of the selected category, are listed on the page.

2. Click the **Flyer name** heading (or the little black arrow) to sort the flyer templates in ascending or descending order.

3. Highlight the flyer template in the list, then click **View or edit** from the action menu.

   The flyer template is displayed in the *View or edit template [template name] from category [category name]* page.

4. The flyer template will display merge codes, such as **Property.view_front**, **Agent.name**, **Listing.flyer_description**, or **Property.address_flyer**. When you print the flyer, the merge codes will be automatically replaced with actual information from your database.

To edit a selected flyer template:

1. From the **Flyers** tab, select the category in which the flyer template you want to edit belongs.
2. Highlight the flyer template in the list, then click **View or edit** from the action menu.

   The flyer template is displayed in the *View or edit template [template name] from category [category name]* page.
3. Use the built-in word processor to edit the flyer template. *See “Using the word processor”, on page 306*.
4. Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture when printing this item for one or more contacts.

   A pick list of merge codes opens, for you to select from.
5. Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item.

   A pick list of merge codes opens for you to select from.
6. Click **Insert marketing link** if you want to merge a marketing link into this template.

   The *Select marketing link* page opens for you to select the link from. See *“Working With Marketing Links”, on page 449*.
7. Click **Save** or **OK**.

   The *Save template* pop-up window opens.
8. Select a category from the drop-down list in which you want to save the new flyer template.
9. Type a name for the new flyer template in the text box, and then click **OK**.
10. Click **Print** from the control menu to send this new template to the printer.

    The *Print* pop-up window opens, letting you set your printer options.

Copying flyer templates

It is a good idea to make a copy of a default flyer template, if you want to personalize it.

To copy a selected flyer template:

1. From the **Flyers** tab, select the category in which the flyer template you want to copy, belongs.
2. Highlight the flyer template in the list, then click **Copy** from the action menu.

   The *Copy template [template name] from [category name] category* pop-up window opens.
3. Specify a new flyer template name in the text box, or accept the existing name with a (**1**) appended to the name.
4. Select the category to which you want to copy the flyer template to, and click **OK**.

The copy of the template is saved in your personal template category.

Renaming flyer templates

You can rename your personal flyer templates.

To rename a selected flyer template:

1. From the **Flyers** tab, select the category in which the flyer template you want to rename, belongs.

> **Note:** You cannot rename default templates. If you try to rename a default template, the *Cannot rename* message box opens. Click **OK**.

2. Highlight the flyer template in the list, then click **Rename** from the action menu.

   The *Rename [template name] template in [category name] category* pop-up window opens.
3. Specify a new name for the flyer template in the text box.
4. Click **OK**.

Deleting flyer templates

You can delete your personal flyer templates.

To delete a selected flyer template:

1. From the **Flyers** tab, select the category in which the flyer template you want to delete, belongs.

Note: You cannot delete default templates. If you try to delete a default template, the *Cannot delete* message box opens. Click **OK**.

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2. Highlight the flyer template in the list, then click **Delete** from the action menu.

   The *Delete [template name] template from [category name] category* message box opens.

3. Click **Yes** to confirm the deletion.

Create and send

Once you have created your own customized flyers, store them in your personal flyer library. For information on sending flyers to contacts, see *"Managing Flyers" on page 377*.

Performing A Mail Out

Performing a mail out to a contact or group of contacts

These instructions assume you are mailing letters, envelopes, labels or postcards using the **Perform mail out** menu option.

For information on Emails, see *“Managing Email” on page 344*. To send marketing links, see *“Working With Marketing Links” on page 449*.To send presentations, see *“Publishing And Emailing A Presentation” on page 442*.

Note: You can also access the **Perform mail out** function from the Communication library, (see *“Print for contact(s)” on page 320*).

1. Point to **Mail**, then click **Perform mail out**.

   The *Perform mail out — select template* page opens.

2. Select the type of mailing you want to create by clicking the **Letter**, **Envelope**, **Label**, or **Postcard** option button.

3. Use the **[mail type] categories** drop-down list to select a category.

   The templates within the category are displayed in the list.

4. Select a template, then:

   • Click the **Change template for this mailing only** link to customize the template for this mailing only. If you edit the template and then change your mind, click **Restore original template**.
   • Click the **Communication library** link to go directly to the *Communication library* page.

   Click **Next**.

5. Select one of the tabs on the *Perform mail out - search contacts* page, depending on which type of contact search you want to perform:

   • **Quick search** — select this tab to perform a search by selecting one of the options: **Last**

name, **First name**, **Contact type**, **Search templates**, **Street name**, **City name**, **State name**, **Company**, **Phone numbers**, or **Email address**.

Type the corresponding information in the **Search for** text box, then click **Start search**.

Note: To display all contacts, leave the **Search for** text box empty and click **Display all**.

- **Advanced search** — select this tab to perform a more detailed search. Click the **Search category** drop-down list and choose an option: **Contact Information**, **Property Statistics**, **Present / Future Home**, **Listings / Closings**, or **Other**. The **Search criteria** grid displays the available search criteria within the selected category. Build your search query, (see *“Using Advanced Search” on page 179*), then click **Start search**.

Note: You can save your customized advanced search query by clicking the **Save Search** link. Similarly, you can use your saved search templates to perform the advanced search by clicking **Search templates**. For more information, see *“Using search templates” on page 184*.

The search results are displayed in the **Available contacts** grid of the *Perform mail out - select contacts* page.

6. Highlight one or more contacts in the list, click **Add** to move them to the **Selected contacts** grid.

Note: Each list has a **Total count** link located at the bottom of the page. Click the link to get an instant tally of how many records appear in each list.

7. Click **Next**.

   The *Perform mail out — view or edit [mail type]* page opens.

8. In this final step you have the option to view and edit the mailing for each recipient.

   - If you selected multiple contacts, use the **<Previous contact** and **Next contact>** links at the top right of the page to switch between contacts, or click **Show contact list** to expand the view to show all your selected recipients, and select from the list.

Note: You can sort the multiple contacts in the list by **Last name**, **Street name**, or **Zip code**. Click the **Sort mail by** drop-down list and select one of the options.

Click **Hide contact list** to revert back to the previous view.

- Click the **Change mailing info** link to modify the selected contact's name and/or address information. The *Change mailing info* pop-up window opens. Modify the contact or address details by typing in the appropriate fields, then click **OK**.
- Make your editing changes in the editing area. Click the **Save** link, (located in the lower left corner) after editing each recipient's mailing.
- Click the **Reset** link to revert the template to its original state.
- Click the **Delete** link to remove the selected contact from the mailing.

9. Click the **Insert picture merge code** link to add a picture merge code into the mailing.

10. Click **Insert merge code** to display a pick list from which you can choose merge codes.

11. Click **Insert link** to add a marketing link to the mailing.

    The *Select marketing link* page opens, letting you choose a link from the list. The program will retrieve the appropriate information from the database.

12. When your mailing is ready:

    - Click **Print now** to print the entire mailing now; or
    - Click **Print later** to schedule the mailing for printing at a later date. When the *Print later* dialog is displayed, enter a personal **Description** of the mailing, the **Date** you want to print it on, and the user to assign it to. The mailing will appear in Today's business on the scheduled date.

Printing the mail out now

Once you have created or selected a letter, envelope, label or postcard, you can print the item for a single contact or multiple contacts.

Note: These instructions assume you are printing from the *Perform mail out* wizard, (see *"Performing a mail out to a contact or group of contacts" on page 337*).

If you are printing draft copies for editing purposes, click the **Print** icon from the toolbar. The document stays open in the *Perform mail out wizard*.

If your mail out is still in the editing stage and you need to print draft copies for review, click the **Print** icon from the toolbar. This ensures that the mailing remains open in the *Perform mail out wizard* and is NOT marked done.

When your mailing is ready, click **Print now** from the control menu to print the entire mailing. Once done, the mailing activity is considered complete and is automatically stored in the contact history section of each contact record.

To print the selected mail out now:

1. From the *Perform mail out - view or edit [mail type]* page, click **Print now** from the control menu.

   The *Print* pop-up window opens.

2. Specify the printer settings according to the type of mail item you are printing.

Note: Print setup options will vary slightly depending on the type of mail item you want to print and depending on the printer you have installed.

Printing Letters and Flyers

1. From the *Print* pop-up window, customize your [letter/flyer] print job by specifying the following:

   - **Printer** — the name of your default printer automatically appears in this field. To specify a different printer, use the drop-down list.
   - **Paper Size** — the default paper size is automatically set to **Letter**. To specify another size, use the drop-down list.
   - **Paper Source** — to specify another type of paper source, use the drop-down list. Depending on the printer you have selected, the options may indicate paper types, such as **Plain**, etc.; or the location of the paper feed, such as **Auto Select**, etc.

- **[Letters per contact/Copies of flyer]** — use the spin buttons to specify the number of copies to print for each contact.
- **Pages per sheet** — use the drop-down list to specify how many template pages you want to print on each sheet of paper.
- **Orientation** — select either the **Portrait** or **Landscape** option buttons.
- **Print on both sides** — use the drop-down list to specify the two-sided print options, if available. The default is **None**.

2. Click **OK**.

Printing Envelopes

1. From the *Print* pop-up window, customize your envelope print job by specifying the following:

   - **Feed method** — click on the icon which best represents how you will feed the envelope into the printer.
   - **Printer** — the name of your default printer automatically appears in this field. To specify a different printer, use the drop-down list.
   - **Paper Size** — the default paper size is automatically set to **Letter**. To specify another size, use the drop-down list.
   - **Paper Source** — to specify another type of paper source, use the drop-down list. Depending on the printer you have selected, the options may indicate paper types, such as **Plain**, etc.; or the location of the paper feed, such as **Auto Select**, etc.

2. Click **OK**.

Printing Labels

1. From the *Print* pop-up window, customize your label print job by specifying the following:

   - **Preview** — click a label position on the label sheet preview to determine exactly where on the sheet the printer will begin printing.
   - **Labels per contact** — use the spin buttons to specify the number of labels to print for each contact.
   - **Printer** — the name of your default printer automatically appears in this field. To specify a different printer, use the drop-down list.

- **Paper Source** — to specify another type of paper source, use the drop-down list. Depending on the printer you have selected, the options may indicate paper types, such as **Plain**, etc.; or the location of the paper feed, such as **Auto Select**, etc.

2. Click **OK**.

Printing Postcards

1. From the *Print* pop-up window, customize your postcard print job by specifying the following:

   - **Preview** — once you've chosen your **Orientation**, **Horizontal** and **Vertical alignment** settings, the preview pane shows you where the postcard will be printed on the page.
   - **Orientation** — select either the **Portrait** or **Landscape** option buttons.
   - **Horizontal alignment** — select the **Left**, **Center**, or **Right** option button to specify the horizontal position of the postcard on the page.
   - **Vertical alignment** — select the **Top**, **Middle**, or **Bottom** option button to specify the vertical position of the postcard on the page.
   - **Postcards per page** — use the spin buttons to specify the number of postcards to print on each page.
   - **Margins & Spacing tab** — use the spin buttons to specify the **Top / Bottom**, **Left / Right** page margins (in inches); and the **Horizontal / Vertical** spacing of the postcard on the page.
   - **Paper size & Printer tab** — use the drop-down lists to change the **Printer**, **Paper Size** or **Paper Source** settings.

2. Click **OK**.

Printing the mail out later

Once you have created or selected a letter, envelope, label or postcard, you can print the item at a later date.

When you choose to print the mail item later, the item will appear in Today's business on the specified date, (see *"Viewing the Today's business page" on page 256*).

Note: These instructions assume you are printing from the *Perform mail out wizard*, (see *"Performing a mail out to a contact or group of contacts" on page 337*).

To print the selected mail out later:

1. From the *Perform mail out - view or edit [mail type]* page, click **Print later** from the control menu.

   The *Print later* pop-up window opens.

2. Specify:

   a) a description for the mailing in the **Description** field; or click the list icon and select a description from the list.

   b) click the calendar icon to specify the **Date** you want this mailing to be sent.

   c) click the **Assigned to** drop-down list and select the person responsible for sending this mailing.

3. Click **OK**.

   The *Perform mail out wizard* closes. To see the deferred mailing item, point to **Schedule**, **Today's business**, and then click the appropriate submenu item, for example, **Letters**.

Note: Alternately, you can point to **Schedule**, **Today's business**, **Summary**, then click the appropriate link on the Summary page.

Managing Email

In this chapter:

Using Email

About email

You can compose and send email directly from Top Producer 7i using either the **Compose new message command** or else an email message template from the Email library.

When sending messages to contacts, the contact's history is automatically updated with the date and description of the email that was sent.

When you receive an email, you can create a contact directly from the message, or link it to a contact already in your contact list.

Note: If you have not already set up your email account, you will be directed to the *Email setup* page. For more information on setting up your email, see *"Setting Email Preferences" on page 107*.

Viewing email

When you open My email, any new email messages appear in bold font.

To access My email and view messages:

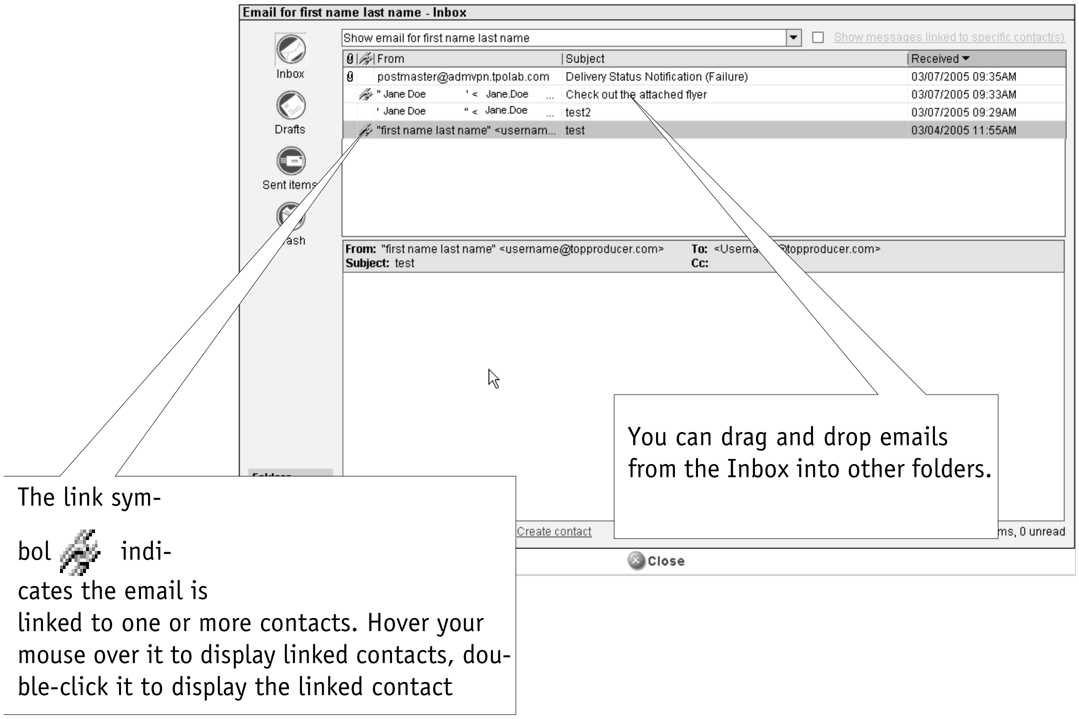
1. From the main menu, select **Email**, then click **My email**.

   The *Emails for first_name last_name- Inbox* page opens, listing your messages. New messages are displayed in bold font.

2. In the *Show emails for first_name last_name* drop down list, select the user whose emails you want to see. Use this feature to see emails for people who have given you access to see their emails.

3. Click a message to preview its contents in the window below the message list.

4. To view a message in a full page, highlight the message and click **Open email** from the action menu or double-click the message.



Checking for new email messages

When you open My email, your new mail is automatically retrieved. However, if you've been working in My email for a while, you may want to check for new messages that have arrived since you first opened My email.

To check for new email messages:

1. From the *My email - Inbox* page, click **Check email** from the action menu to download new email that arrives while you are using My email.

   Any new messages will appear in bold font.

Creating contacts from incoming email

My email makes it easy to create a new contact from email you receive. If the contact you are sending the message to is already in your database, do not create a new contact record. Instead, link the email to the contact as described in the next section.

To create a new contact record from an incoming email message:

1. In the *My email - Inbox* page, highlight the email message you want to create the contact record for.

2. Click the **Create contact** link at the bottom of the page.

3. In the *Detailed contact entry - Add new contact* page, fill in any additional data fields you can, add notes if desired, then click **OK**.

   For more information on adding a new contact, see *“Creating Contacts” on page 122*.

Linking email to contacts and viewing an email correspondence history

When you receive an email from a contact who is already in your database, you should link the message to the appropriate contact. Linking the email ensures that it will appear in the contact’s history and you will be able to easily view the history of your correspondence with the contact.

To link an incoming email message to a contact or contacts:

1. In the *My email- Inbox* page, highlight the email message you want to link to a contact record.
2. Click **Link to contact(s)**.
3. From the *Select contact(s)* page, search for and highlight the contact or contacts that you want to link the email message from the **Available contacts** grid.
4. Click **Add** to move them to the **Selected contacts** grid.
5. Click **OK**.

To remove links to an email, highlight the email and click **Remove links.** Click **Yes** to confirm you want to remove the link.

To view all email messages linked to a specific contact:

1. In the *My email- Inbox* page, select the **Show messages linked to specific contact(s)** check box, located in the upper right corner of the page.

   The **Show messages linked to specific contact(s)** link becomes available.

2. Click the link.

   The *Select contact(s)* page opens.

3. Search for and select the contact(s) from the **Available contacts** grid, whose linked email messages you want to view.
4. Click **Add** to move the contacts to the **Selected contacts** grid, then click **OK**.

   Your correspondence history of messages linked with this contact are displayed.

5. To return to viewing all messages, clear the **Show messages linked to specific contact(s)** check box.

To view the contact details of a linked contact:

1. In the *My email- Inbox* page, highlight an email message that is linked to a contact (look for the chain link symbol ( ) to the left of the message).

2. Click **View contact** from the action menu.

   The *Contact details for [linked contact name]* page opens.

   For more information on working with contact details, see *"Viewing a contact record" on page 132*.

A "hidden" contact is a contact that you have entered into the system but chosen NOT to add to your Address book. For more information, see *"About hidden contacts" on page 124*.

Note: If you are viewing an email that was sent to a "hidden" contact, you will see a new empty contact record has been created and associated with the message. This contact record does NOT have a **First name** or **Last name**, but bears the correct email address. Top Producer 7i does this so that you can track emails sent to hidden contacts, as these events are NOT available in the transaction history.

Working with custom folders

You can create your own custom folders in addition to the default folders provided. Once created, you can rename and remove the custom folders, as well as move or copy any emails you want into them.

For example, create a folder called "Immediate" and move or copy any email requiring immediate action into it.

Note: You cannot, however, modify or delete any of the default folders.

To create and manage custom folders in My email - Inbox:

1. In the **Folders** section, located in the bottom left corner of the page:

   - create a new folder by clicking the **New** link. Type a folder name, then click **OK**.
   - rename a folder by selecting a personal folder, then clicking the **Rename** link. Type a new folder name, then click **OK**.

- delete a folder by selecting a personal folder, then clicking the **Delete** link. A dialog box opens and asks you to confirm deletion of the folder and all emails inside. Click **Yes** to continue.

To move or copy an email from one folder into a different folder:

1. Highlight an email in the Inbox (or any other highlighted folder).

2. Click **Move to folder** or **Copy to folder** from the action menu.

   The *Move to folder* or *Copy to folder* pop-up window opens.

3. To:

   - copy or move the email into an existing folder, select the destination folder from the list, then click **OK**.
   - copy or move the email into a NEW folder, type the name of a new folder in the text field at the bottom of the pop-up window, then click the **Add new folder** link. The new folder appears in the list. Click **OK**.

4. To view the contents of a folder, click on it.

Viewing your assistant's email

To view your assistant's email:

- Click the drop-down list at the top of the *My email* page and select your assistant.
- To return to viewing your own email, click the drop-down list and select **Show emails for** (your) **first name last name**, and select your name.

Reply/Reply to all

You can easily send a reply to an email message sender (and all other recipients).

To reply to an email:

- With the email message in view or selected, click one of the following action menu items:
  - **Reply** — to reply only to the message sender.
  - **Reply to all** — to reply to the message sender AND any other people listed in the original message's [**To**/**Cc**] fields.

Note: In the reply email message, the **To** and **Subject** fields will be completed automatically, however, any attachments will NOT be included.

The *New email message* page opens. For more information, see *"Composing And Sending Email" on page 352*.

Forwarding email

You can easily forward an email message to a third party.

To forward an email:

- With the email message in view or selected, click **Forward** from the action menu.

Note: The **To** and **Subject** fields will be completed automatically AND any attachments from the original email WILL be included.

The *New email message* page opens. For more information, see *"Composing And Sending Email" on page 352*.

Printing an email

To print an email from the My email - Inbox page:

1. Highlight or double-click the email message from the *My email - Inbox* page and click **Print**.
2. Set up your printer settings, then click **OK**.

Emptying the trash

When you delete an email, the email moves to the **Trash** folder. When you click the **Empty trash** action menu item, all emails in the **Trash** folder will be permanently deleted. Messages in the **Trash** folder will automatically be deleted after 15 days.

To remove all emails located in the Trash folder:

1. Click **Empty trash** from the action menu.

   The *Empty trash* dialog box opens.

2. Click **Yes** to proceed.

Note: If you want to permanently delete selected emails without sending them to the **Trash** folder, press **[Shift]** + **[Delete]** on your keyboard. When the *Delete email messages* dialog box opens, click **Yes**.

Setting email preferences

Select the **Preferences** action menu item to change your email preferences and manage email accounts. See *“Setting Email Preferences” on page 107*.

Composing And Sending Email

The My email feature provides all the functions of a standard email program, including composing and sending email, replying to email, forwarding email, replying to all email recipients, and deleting email. In addition, you can use the HTML editor to insert text and picture merge codes and print the message in HTML.

For instructions on sending pre-written marketing email from the email library, see *"Working With The Email Template Library" on page 368*.

At any time during the composition of an email, click **Save** to save to the email in the **Drafts** folder. Open the **Drafts** folder and double-click the email to continue where you left off.

To compose and send an email:

1. Point to **Email**, then click **Compose new message**.

> **Note:** Alternatively, from My email, click **Compose** from the action menu.

   The *New email message* page opens.

2. Click the **[To / Cc / Bcc]** link(s).

   The *Select recipients for this email message* page opens.

> **Note:** There are three grids on the right side of the page, enabling you to select contact(s) for the **To recipients**, **Cc recipients**, or **Bcc recipients** fields.

   a) In the **Search contact by** section, choose one of the option buttons:

   - **Listing** (address)
   - **Name**
   - **Address**
   - **Contact type**
   - **All contacts** (displays all your contacts)

b) Enter a search criterion (for example, a last name) in relevant box and click **Start search**.

Note: Only contacts with an email address are displayed.

Hold down the **[Ctrl]** or **[Shift]** keys while highlighting contacts to select groups of contacts.

c) Highlight the contact or contacts to whom you wish to send the email from the **Available recipients** grid, and click **Add** to move them to the appropriate **[To/Cc/Bcc] recipients** grid(s). You may select as many contacts as you want.

d) Click **OK** when you have selected all the contacts to whom you wish to send the email.

The *New email message* page re-opens.

3. Type a subject for the email into the **Subject** box.

4. If you want to add a file attachment, click the **Attachments** link.

   The *Attachments* page opens.

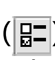
   a) Click the **Attach file** link (located in the bottom right corner of the page).

   b) Use the *Select the file to attach* pop-up window to navigate to the attachment file location on your computer.

   c) Click the **Look in** drop-down list and navigate to the folder the file is stored in. Select the file you want to attach and click **Open**.

   The file appears in the **File name** list of the *Attachments* page.

   d) Repeat to add more attachments, if desired, then click **OK**.

5. Click the **Preferences** toolbar icon () and select the message format you want to use (**HTML** or **Plain text**), then click **OK**.

Mass email only allows you to work in HTML mode. For more information, see *"Sending Mass Email" on page 356*.

Note: HTML is the default selection. If you switch from **HTML** to **Plain text**, all text formatting will be lost in your email message. A dialog box opens, asking you to confirm the change of message format. Click **Yes** to continue.

---

6. With the cursor in the message body of the *New email message* page, type a message.

7. Use any of the toolbar icons (available in HTML mode) to customize your message, (see *"The HTML editor commands" on page 360*).

8. Click any of the following links at the bottom of the page:

   - **Insert signature** — click this link to add the agent signature in the email message. To set up the signature, see *"Agent Setup" on page 35*.
   - **Insert company logo** — click this link to add a company logo in the email message. This link is NOT available in **Plain text** mode. To set up the company logo, see *"Managing Teams And Partnerships" on page 44*.
   - **Insert user photo** — click this link to add an agent or assistant photograph. This link is NOT available in **Plain text** mode. To set up this feature, see *"Managing Teams And Partnerships" on page 44*.
   - **Request a read receipt** — select this check box if you wish to get notification that your email was received by the selected contact.
   - **Insert unsubscribe text** — remove the text and link that enables email recipients to opt out of your mailouts by clearing this check box. For more information, see *"Viewing the Unsubscribe Text" on page 110*.
   - **Insert marketing link** — click this link to insert a marketing link URL or web site address into the email. The *Select marketing link* page opens, enabling you to highlight a URL from the list. Click **OK**. This link is NOT available in **Plain text** mode. For more information, see *"Sending marketing links to your contacts" on page 453*.
   - **Clear message** — click this link to clear the existing email message content so you can start over. This link is NOT available in **Plain text** mode.

9. Click **Print** from the action menu to set up your printer options and print the email.

10. Click **Send** from the control menu to send the email.

11. Click **Save as draft** from the control menu to save your message. You can retrieve it, work on it and send it at a later date.

Note: For information on sending multiple email in HTML, see *"Sending Mass Email" on page 356*.

Sending Mass Email

You can access the Mass email function from three different areas of the **Email** menu:

- **Mass email** (as outlined in this section).
- **Email library**, (see *"Sending library email to contacts" on page 374*).
- **My email - Inbox**, (by clicking **Mass email** from the action menu).

The *Mass email* page only supports the HTML text mode. For more information, see *"Using the HTML Editor" on page 359*.

To send a mass email (with attachments):

1. Point to **Email**, then click **Mass email**.

   The *Mass email* page opens.

2. Select an email category and template from the **Category** and **Template** drop-down lists, then click the **Use this template** link.

3. Click the **To** link and select the contact(s) you want to send the email to (the contact must have an email address to be displayed), then click **OK**. Or type an email address in manually.

4. Check that the **Subject** line of your email is appropriate (if necessary, edit the subject).

5. If you want to add a file attachment, click the **Attachments** link.

   a) From the *Attachments* page, click the **Attach file** link.

   b) Select the drive your file is stored on in the **Look in** drop-down list, navigate to the folder the file is stored in, select the file you want to attach and click **Open**.

   The file will appear in the **File name** list of the *Attachments* page.

If you have completely filled in your agent information according to the instructions in *"Agent Setup" on page 35*, your agent information will automatically appear in the email, as will today's date and the contact salutation (for example, "Dear Bill"). For more information about the merge code feature that makes this possible, see *"Inserting pictures, text, and marketing links" on page 314*.

c) Repeat to add more attachments, if desired, then click **OK** to return to the *Mass email* page.

6. With the cursor in the message body, compose an email message (which will be in HTML).

Note: Mass email only allows you to work in HTML mode, enabling you to add pictures and picture merge codes in addition to text merge codes and marketing links to your email. Therefore, the **Preferences** icon will not be visible on the toolbar. See *"Using the HTML Editor" on page 359*.

7. Select the **Include signature** check box to insert the agent signature that you specified in Agent setup, (see *"Specifying agent information" on page 35*).

8. Click any of the links located at the bottom of the page:

   - **Insert signature** — select this check box to add the agent signature in the email message. To set up the signature, see *"Agent Setup" on page 35*.
   - **Insert picture merge code** — lets you insert a picture merge code into an email template or message, (see *"Inserting a picture merge code into the email message" on page 362*).
   - **Insert merge code** — lets you insert a text merge code into an email template or message, (see *"Editing an email in HTML editor" on page 365*).
   - **Insert marketing link** — lets you insert a marketing link into an email template or message, (see *"Inserting pictures, text, and marketing links" on page 314*).
   - **Clear message** — lets you clear the email message content.

9. Click **Print** from the action menu to set up your printer options and print the email.

10. Click **Next** from the control menu.

The *View or edit email for [To]* page opens.

11. Use the editing toolbar to format your text. For more information, (see *“The HTML editor commands” on page 360*).

12. When you are ready to send the email, click **Send** from the control menu.

Using the HTML Editor

Top Producer 7i has an integrated email editing environment that supports both HTML and Plain text modes. When you view a new email message, you will be able to see it in HTML.

When you edit or compose an email message, you can:

- choose HTML or Plain text formats (mass email supports HTML only)
- insert pictures and picture merge codes into the message body
- print a formatted email message in HTML

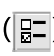
Selecting the email message format

HTML mode is the default setting for the editor, which makes all of the toolbar items available for your use. If you are using Plain text mode, available when composing a single email, only some of the toolbar icons are available.

To select the email message format:

1. From the main menu, point to **Email**, then click **Compose new message**; or **Mass email**.

   The *New email message* or *Mass email* page opens.

2. Click the **Preferences** toolbar icon () to open the *Preference* pop-up window.

3. Select one of the following options, then click **OK**:

   - **HTML** (the default selection)
   - **Plain text**

4. Use the HTML editor commands. For more, see *"The HTML editor commands" on page 360*.

The HTML editor commands

The toolbar at the top of the message area allows you to control the appearance of the text and other objects:

Undo/Redo — undo or redo your last operation

Spelling — run the spell checker on your document

Find and replace — search for and replace text

Cut, Copy, and Paste — edit selected text

Bold, Italic, Underline — text formatting attributes (available in HTML mode only)

Font color — click the arrow and select text color (available in HTML mode only)

Align left, Center, Align right — text alignment settings (available in HTML mode only)

Font type — click the arrow and change text font

Font size — click the arrow and change text size

Bullets — create a bulleted list from selected text (available in HTML mode only)

Numbered list — create a numbered list (available in HTML mode only)

Increase indent, Decrease indent — change text indent from the margin (in 0.5 inch increments) (available in HTML mode only)

Insert horizontal line — insert a horizontal line in the message at the cursor point (available in HTML mode only)

Insert hyperlink — add hyperlinks into the document (available in HTML mode only)

Insert picture from file — add a picture into your document (available in HTML mode only)

Preferences — set the message format to HTML or Plain text

Inserting a text merge code into the email message

The link is NOT available from the *New email message* page, when working with a single email.

The **Insert merge code** link is used in HTML mode if you want to insert a specified string of contact information automatically when you are sending or printing email for one or more contacts.

If you are working with mass email, the actual data (instead of the merge code) will be inserted into the document when you send the email.

If you are working with an email template, as in the Email library, the merge code will be inserted into the document.

To insert a text merge code:

1. Click the **Insert merge code** link at the bottom of the *Mass email*, *New email template,* or *View or edit template* page.

   The *Insert merge code* pick list opens.

2. Click the **Select category** drop-down list and choose a category of merge codes, for example, **Agent** or **Property**.

3. Select a merge code from the list, for example **[Property.address]**.

4. Click **OK**.

   The specified data will be retrieved from the database when you send or print the document.

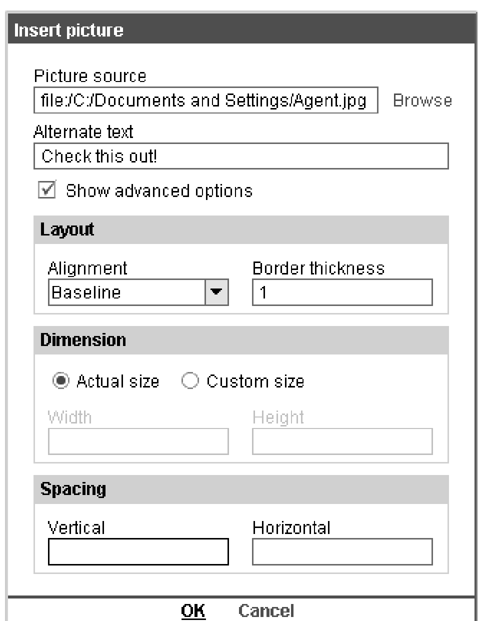
Inserting a picture from a file into the email message

You can insert an inline picture into the email message body. This function is only available in HTML mode and supports the following file formats: .bmp; .gif; .jpeg; .jpg; or .png.

To insert a picture into an email message:

1. From the HTML editor toolbar, click the **Insert picture from file** () icon.

   The *Insert picture* pop-up window opens.



2. Specify the path of the picture file in the **Picture source** text box, or click the **Browse** link to open the *Select file* pop-up window. Navigate to the picture file location on your computer, then click **Open**.

3. In the **Alternate text** field, type a text string that will appear in lieu of the picture, should the email recipient not be able to view the inserted picture.

4. Select the **Show advanced** options check box to display the rest of the window. If the check box is NOT selected, the **Layout**, **Dimension**, and **Spacing** sections of the window will be hidden from view.

5. In the **Layout** section:

   - click the **Alignment** drop-down list and select the type of alignment option you want for the picture: **Baseline** (default), **Left**, **Right**, **Top**, **Middle**, or **Bottom**, (see *"Aligning a picture" on page 364*).
   - specify (in pixels), the thickness of the border around the picture by typing in the **Border thickness** text box. The allowable range is from 0-500 pixels.

6. In the **Dimension** section:

   - if you select the **Actual size** option, the **Width** and **Height** settings (in pixels) of the picture are displayed.
   - If you select the **Custom size** option, you can specify new custom **Width** and **Height** settings (in pixels) for the picture.

7. In the **Spacing** section:

   - specify (in pixels) the amount of space across the top and bottom of the picture in the **Vertical** text box. The allowable range is from 0-500 pixels.
   - specify (in pixels) the amount of space along the left and right sides of the picture in the **Horizontal** text box. The allowable range is from 0-500 pixels.

8. Click **OK**.

Inserting a picture merge code into the email message

The **Insert picture merge code** link is NOT available from the *New email message* page, when composing and sending a single email. It is available when composing and sending mass email or when working with an email template.

To insert a picture merge code:

1. From the main menu, point to **Email**, then click **Mass email**.

   The *Mass email* page opens.

2. Click the **Insert picture merge code** link at the bottom of the page.

   The *Insert picture merge code* pop-up window opens.

3. Click the **Select merge code** link to open the *Insert picture merge code* pick list. Highlight a picture merge code, for example **[Property.map_city]**, from the list and click **OK**.

   Your selection appears in the **Picture source** text box, and in the **Alternate text** field.

4. In the **Alternate text** field, type a text string that will appear in lieu of the picture, should the email recipient not be able to view the inserted picture; or accept the merge code that is automatically filled in.

5. Select the **Show advanced** options check box to display the rest of the window. If the check box is NOT selected, the **Layout**, **Dimension**, and **Spacing** sections of the window will be hidden from view.

6. In the **Layout** section:

   - click the **Alignment** drop-down list and select the type of alignment option you want for the picture: **Baseline** (default), **Left**, **Right**, **Top**, **Middle**, or **Bottom**, (see *"Aligning a picture" on page 364*).
   - specify (in pixels), the thickness of the border around the picture by typing in the **Border thickness** text box. The allowable range is from 0-500 pixels.

7. In the **Dimension** section:

   - if you select the **Actual size** option, the **Width** and **Height** settings (in pixels) of the picture are displayed.
   - If you select the **Custom size** option, you can specify new custom **Width** and **Height** settings (in pixels) for the picture.

8. In the **Spacing** section:

- specify (in pixels) the amount of space across the top and bottom of the picture in the **Vertical** text box. The allowable range is from 0-500 pixels.
- specify (in pixels) the amount of space along the left and right sides of the picture in the **Horizontal** text box. The allowable range is from 0-500 pixels.

9. Click **OK**.

Aligning a picture

When you insert a picture, you can choose an alignment option from the **Layout** section of the *Insert picture* pop-up window while you are adding the picture, (see *"Inserting a picture from a file into the email message" on page 361*).

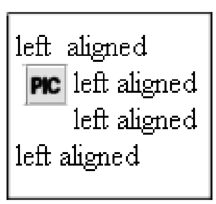
If you are aligning a picture merge code already added to the message body of the email, right-click on the merge code to open the shortcut menu. Select **Properties** to open the *Picture properties* pop-up window. For more information on shortcut menus, (see *"Using the Shortcut Menu" on page 365*).

To align a picture or picture merge code:

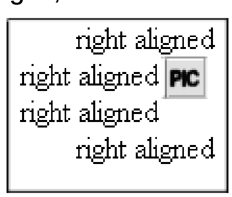
1. Click the **Alignment** drop-down list and choose one of the following options, depending on how you want to align your picture:

   - **Baseline** — the image is aligned with the baseline of the adjacent text:

   - **Left** — the image is aligned with the left margin; the text is able to wrap around the image:

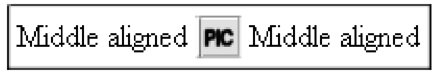


   - **Right** — the image is aligned with the right margin; the text is able to wrap around the image:

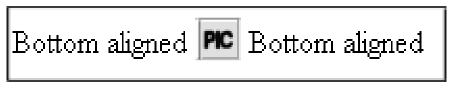


- **Top** — the top of the image is aligned with the top of the largest item in the line of text:

- **Middle** — the middle of the image is aligned with the middle of the line of text:



- **Bottom** — the bottom of the image is aligned with the bottom of the line of text:



2. Click **OK**.

Editing an email in HTML editor

You can make changes to the text or pictures in an email message by right-clicking on a selection (an image or a portion of highlighted text). A shortcut menu opens, displaying editing options. Or, you can use the toolbar icons and links to edit your email message, depending on what you want to do.

Using the Shortcut Menu

When you right-click on highlighted text, an image or table, a shortcut menu opens so that you can quickly select some editing commands. These editing commands use the clipboard to perform the same function as the corresponding toolbar icons.

Note: The **Hyperlink** and **Properties** commands can be accessed only from the shortcut menu.

To edit text, an image, or table using the shortcut menu:

1. Highlight the selection you want to change, then right-click to open the shortcut menu.

2. Click one of the following, depending on what you want to do:

- **Cut** — to cut the selection
- **Copy** — to copy the selection to the clipboard
- **Paste** — to paste the cut or copied selection at the cursor insertion point
- **Select All** — to highlight all contents

To edit a hyperlink using the shortcut menu:

1. Highlight a hyperlink in the email message, then right-click to open the shortcut menu.
2. Click **Hyperlink...** from the shortcut menu.

   The *Edit hyperlink* pop-up window opens.
3. Enter or edit the hyperlink address in the **Enter the URL or web site address** text box. Click:
   - click **Test link** to check if the URL is working.
   - click **Remove link** to change the hyperlink to ordinary text.
4. Click **OK**.

To edit picture properties using the shortcut menu:

1. Select a picture or picture merge code, then right-click to open the shortcut menu.

> **Note:** To select a picture you can double-click on the image, right-click on the image, or press the **[Shift]** + **[arrow]** keys.

2. Click **Properties**.

   The *Picture properties* pop-up window opens.
3. Make changes to fields as necessary, following the field descriptions and options outlined in *"Inserting a picture from a file into the email message" on page 361*.
4. Click **OK**.

Deleting a picture

You can delete an unselected picture by clicking either the **[Delete]** or **[Backspace]** keys to remove the image just like you would a character. Or, you can select a picture or picture merge code, then do one of the following:

- right-click to open the shortcut menu and use the **Cut** command.
- press the **[Delete]** key.

Printing an email in HTML format

You can print a received email message, sent, saved, or currently edited email message in HTML format. If there are any attachments, they will not be printed. All margins are set to 0.75 inch and cannot be edited.

To print an email message in HTML format:

1. While viewing the email message, click **Print** from the action menu.

   The *Print* pop-up window opens.

2. Customize your print job by setting the following:

   - **Printer** — click the drop-down list to choose a currently installed printer.
   - **Paper Size** — click the drop-down list to choose an available paper size, for example, **Letter**, **Legal**, etc.
   - **Paper Source** — click the drop-down list to choose the printer tray you want to use and the paper source, for example, card stock, recycled, etc.
   - **Number of copies** — use the spin buttons to specify how many copies you want to print.
   - **Orientation** — choose either the **Portrait** or **Landscape** option button.
   - **Print on both sides** — click the drop-down list and specify if you want two-sided printing, flipped on their long or short edge.

3. Click **OK** to send the email message to the printer.

Note: Print settings are not saved. Once you have finished printing and close the *Print* pop-up window, the settings are returned to their default values.

Working With The Email Template Library

Top Producer 7i comes pre-loaded with an expandible library of email templates that have been written to serve a variety of marketing and prospecting purposes. Some email are more sales-oriented, while others are more informative and communicate that you are an expert in all matters of financing, buying, selling and maintaining a home. Some email emphasize traditional people skills, network-building and negotiating experience, while others emphasize market knowledge, marketing expertise and techno-savvy in today's increasingly Internet-based sales and marketing environment. All email, however, convey sincerity and are meant to facilitate the "client for life" ideal.

These email — which have primarily been written for use in assigned action plans — can also be used "as is," or modified in terms of content and design to suit your needs. In addition, you can create your own email. For a description of some of the action plans, see *"Working With Plans" on page 231*.

Personalizing an email template

When you personalize an existing email template in the Email library for general use (i.e. not as part of an assigned action plan), you should:

1. Create your own email category in the Email library (perhaps call your new category "**My Email**").
2. Make a copy of the specific email and name this copy something similar to the original email's name (so you can still easily associate the original and the copy).
3. Personalize the copy (the original email cannot be edited and will remain intact).
4. Save the personalized copy in your new email category.

Before you personalize an existing email for general use, you will need to create and work with personal email categories. These instructions are outlined in the Mail chapter, (see *"Working With Template Categories" on page 294*).

To personalize an email template's content and design:

1. From the **Email messages** tab in the Communication library, select the email category you want to view in the **List of categories** drop-down list.

   The list of available email in that category appear in the **Email messages** list.

2. Highlight the email template you want to work with from the **Email messages** list, then click **View or edit** from the action menu.

   The template is displayed in the *View or edit template [template name] from category [category name]* page.

3. You now have the following options:

   - View or edit the template (see *page 370*).
   - Insert merge codes, pictures, and/or marketing links into the template (see *page 314*).
   - Print the email template (see *page 350*).
   - Save the template, and return to the *Email messages* page.

Note: If you have personalized a default template, the *Save template* pop-up window prompts you to rename the revised template and save it in a personal category. This way, the original email template's content and design remains intact. For more information, see *"Viewing or editing email templates" on page 370*.

Creating a New Email Template

Unless you want to add your email to a category in the Email library, it is recommended that you create your own personal category before you create a new email template.

To create a new email template:

1. Point to **Email**, then click **Email library**.

2. From the **Email messages** tab, click **Create new** from the action menu.

   The *New email template* page opens.

3. Do the following:

- Type a subject heading for the new email template in the **Subject** text box.
- Type your email message in the body of the blank template (which will be in HTML).

Note: HTML mode allows you to add pictures and picture merge codes to your email template. As you cannot create a new Email template in **Plain text** mode, the **Preferences** icon will not be visible on the toolbar. For more information, see *"Using the HTML Editor" on page 359*.

- Use the HTML editor toolbar commands to format the content of the new template, (see *"Using the HTML Editor" on page 359*).
- Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing or sending this item. The *Insert merge code* pick list opens. See *"Editing an email in HTML editor" on page 365*.
- Click the **Insert picture merge code** link if you want to merge a picture into the body of your email message when printing or sending this item. The *Insert picture merge code* pop-up window opens. See *"Inserting a picture merge code into the email message" on page 362*.
- Click **Insert marketing link** if you want to merge a marketing link into this template. The *Select marketing link* page opens. See *"Working With Marketing Links" on page 449*.

To insert an image into the body of your email template, use the **Insert picture from file** toolbar icon.

4. Click **OK**.

   The *Save template* pop-up window opens.

5. Select a personal category from the drop-down list in which you want to save the new template.

6. Type a name for the new template in the text box, and then click **OK**.

Viewing or editing email templates

To view or edit a selected email template:

1. From the **Email messages** tab, select the category in which the email template you want to view or edit, belongs.

   The email templates that are part of the selected category, are listed on the page.

2. Click the **Email messages** heading (or the little black arrow) to sort the email templates in ascending or descending order.

3. Highlight the email you want to view or edit in the **Email messages** list.

4. Click **View or edit** from the action menu.

   The email message is displayed in the *View or edit template [template name] from category [category name]* page.

Note: When you view an email in the *View or edit template* page, you will see the merge field designations. However, when you send this email to one or more contacts, the actual date, name(s), address(es), etc. will be automatically filled in from the information in your database.

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5. Use the HTML editor toolbar commands to edit and format the email message (which will be in HTML). For more information on using the HTML editor, see *"Using the HTML Editor" on page 359*.

Note: Email templates only allow you to work in HTML mode, enabling you to add pictures and picture merge codes. Therefore, the **Preferences** icon will not be visible on the toolbar.

Some email in the Email library contain conditional inserts enclosed in arrow symbols (for example, <<year>>) that allow you to customize the email's content. For instance, one email reads "I've been helping first time home buyers since <<year>>." When you see these inserts, you will need to edit the email to fill in the desired content (in the example above, a specific year). Make sure, when you fill in the desired content, that you completely remove the arrows (<< >>).

6. Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing or sending this item.

   The *Insert merge code* pick list opens. For more information, see *"Editing an email in HTML editor" on page 365*.

7. Click the **Insert picture merge code** link if you want to merge a picture into the body of your email message when printing or sending this item.

   The *Insert picture merge code* pop-up window opens. For more information, see *"Inserting a picture merge code into the email message" on page 362*.

8. Click **Insert marketing link** if you want to merge a marketing link to pictures on your web site in the email template. Clicking on this link will open the picture in the recipient's browser. This way, you can avoid having to email large pictures. This is especially useful if you are conducting a mass email.

   The *Select marketing link* page opens. For more information, see *"Working With Marketing Links" on page 449*.

9. Click **OK**.

   The *Save template* pop-up window opens.

10. Select a category from the drop-down list in which you want to save the revised email template.

11. Type a name for the email in the text box, and then click **OK**.

Copying email templates

It is a good idea to make a copy of a default email template, if you want to personalize it.

To copy a selected email template:

1. From the **Email messages** tab, select the category in which the email template you want to copy, belongs.

2. Highlight the email template in the list, then click **Copy** from the action menu.

   The *Copy template [template name] from [category name] category* pop-up window opens.

3. Specify a new email template name in the text box, or accept the existing name with a (**1**) appended to the name.

4. Select the category to which you want to copy the flyer template to, and click **OK**.

Renaming email templates

You can rename a personal email template.

To rename a selected email template:

1. From the **Email messages** tab, select the category in which the email template you want to rename, belongs.

> **Note:** You cannot rename default templates. If you try to rename a default template, the *Cannot rename* message box opens. Click **OK**.

2. Highlight the email template in the list.

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

   The *Rename [template name] template in [category name] category* pop-up window opens.

4. Specify a new name for the email template in the text box.

5. Click **OK**.

Deleting email templates

You can delete your personal email templates.

To delete a selected email template:

1. From the **Email messages** tab, select the category in which the email template you want to delete, belongs.

Note: You cannot delete default templates. If you try to delete a default template, the *Cannot delete* message box opens. Click **OK**.

2. Highlight the email template in the list.
3. Click **Delete** from the action menu.

   The *Delete [template name] template from [category name] category* message box opens.
4. Click **Yes** to confirm the deletion.

Sending library email to contacts

Top Producer 7i gives you many ways to send marketing email (with attached flyers or other files, if desired) to contacts. The instructions in this section assume that you have already created /edited and saved the email you want to send (with the exception of minor changes) according to the appropriate instructions in *"Creating a New Email Template" on page 369*.

If you have completely filled in your agent information according to the instructions in *"Agent Setup" on page 35*, your agent information will automatically appear in email, as will today's date and the contact salutation (for example, "Dear Bill"). For more information about the merge code feature that makes this possible, see *"Inserting pictures, text, and marketing links" on page 314*.

To send a selected email message template (with attachment):

1. From the **Email messages** tab, select a category from the **List of categories** drop-down list.
2. Highlight a message from the **Email messages** list.
3. Click **Send** from the action menu.

   The *Mass email* page opens.
4. Select an email category and template from the **Category** and **Template** drop-down lists, then click the **Use this template** link.
5. Click the **To** link and select the contact(s) you want to send the email to (the contact must have an email address), or type an email address in manually.
6. Check that the **Subject** line of your email is appropriate (if necessary, edit the subject).

7. If you want to add a file attachment, click the **Attachments** link.

   a) From the *Attachments* page, click the **Attach file** link.

   b) Select the drive your file is stored on in the **Look in** drop-down list, navigate to the folder the file is stored in, select the file you want to attach and click **Open**.

   The file will appear in the **File name** list of the *Attachments* page.

   c) Repeat to add more attachments, if desired, then click **OK** to return to the *Mass email* page.

8. Closely review the email, and make any necessary changes using the HTML editor, (see *“The HTML editor commands” on page 360*). For more information on modifying templates, see *“Viewing or editing email templates” on page 370*.

9. Select the **Include signature** check box to insert the agent signature that you specified in Agent setup, (see *“Specifying agent information” on page 35*).

10. Click any of the links located at the bottom of the page:

    - **Insert picture merge code** — lets you insert a picture merge code into the email, (see *page 362*).
    - **Insert merge code** — lets you insert a text merge code into the email, (see *page 365*).
    - **Insert marketing link** — lets you insert a marketing link into the email, (see *page 449*).
    - **Clear message** — lets you clear the email message content.

11. Click **Print** from the action menu to send the email to the printer.

12. Click **Next**.

The *View or edit email for [To]* page opens showing you the email message as it will appear to the recipient.

13. Make any further modifications, if required.

14. Click **Print** from the action menu to see a print out of the email message.

15. Click **Send** from the control menu to send the email.

    For more detailed information on working with mass emails, see *“Sending Mass Email” on page 356*.

Managing Flyers

In this chapter:

Working With The Flyer Library

Top Producer 7i comes with a large library of attractive and customizable flyer templates that cover all the standard prospecting and marketing themes, such as:

- **Just Listed**
- **Just Sold**
- **Open House**
- **Agent Open**
- **Multiple Listings**
- **Priced To Sell**
- **Price Reduction**

As well, there are service-related themes you can print or add to your prospecting action plan emails.

Accessing the flyer library

To access the Flyer library:

1. Point to **Flyers**, then click **Flyer library**.

   The **Flyers** tab is displayed on the *Communication library* page.

2. For instructions for viewing, adding, renaming, and deleting personal flyer templates categories, see *"Working With Template Categories" on page 294*.

Creating A New Flyer

You can create a professional looking, customized flyer from two areas in Top Producer 7i.

To create a new flyer from the My flyers page:

1. Point to **Flyers**, then click:
    - **Create flyer**; or
    - **My flyers** to display the *My flyers* page. Click **Create new** from the action menu.

    The *Create flyer — Select the flyer you want to create* page opens.

2. Select a flyer category from the **Categories** list on the left side of the page.

    Flyers available in this category will be displayed as thumbnail images in the **Templates** section of the page. Click **View** link under each flyer template to preview the flyer in a new window.

3. Click on the thumbnail representing the flyer you want to create so that there is a border around the image. Click **Next**.

    The *Create flyer - Select property* page opens.

> **Note:** If the flyer you are creating requires multiple properties, the *Create flyer - Select property* page is slightly different than if the flyer requires a single property or does NOT require a property at all.

4. To search for a single or multiple propert(ies), select an option button in the **Search contact by** section and enter the search criteria; or select the **All contacts** option and leave the text boxes blank.

5. Click the **Start search** link to perform the search. For more information on searching for contacts, see *“Searching for contacts using Quick search” on page 176*.

The search results are displayed.

- If the selected flyer is a single property template, the contacts are displayed in the list box. Highlight the property and click **Next**.
- If the selected flyer is a multiple property template, for example the “11 Houses” template, the contacts are displayed in the **Available contacts** grid. Highlight the properties, then click **Add** to move them to the **Selected contacts** grid. Click **Next**.

Note: If you have selected a flyer that requires a specific number of properties, such as the “11 Houses” template, you must select exactly 11 properties in order to proceed. Only then will the **Next** button be available.

- If the selected flyer template does NOT require a property selection, for example some of the flyers available in the **Miscellaneous** category, the *Create flyer - Select property* page does not appear.

The *Create flyer — Edit text and pictures* page opens.

6. Click the **Insert picture merge code** link in the bottom right corner of the page to automatically merge a picture into the template.

   A pick list of merge codes opens for you to select from.

7. Click the **Insert merge code** link if you want to merge a piece of contact or agent information when printing this item.

   A pick list of merge codes opens for you to select from.

8. Click **Insert marketing link** if you want to merge a marketing link into this template.

   The *Select marketing link* page opens for you to select the link from. See *“Working With Marketing Links” on page 449*.

9. Click **Next**.

   The *Create flyer — Distribute flyer* page opens.

10. Click on one of the following options that represents the method of distribution you want to use for this flyer:

- **I want to publish this flyer to the web and email it as a link to my contacts**
- **I want to print this flyer**
- **I want to publish this flyer to the web and view it in Adobe Acrobat**
- **I want to finish this flyer and print, send, or publish it later**

These options are discussed in the following sections.

Sending a new flyer link in an email

To publish a flyer and email the link:

1. Follow the instructions in *“Creating A New Flyer” on page 379* until you get to the final step; or follow the instructions in *“Sending an existing flyer” on page 385*.

2. Select the **I want to publish this flyer to the web and email it as a link to my contacts** option.

3. Click **Finish**.

   The *Send by email link* page opens, showing an email message containing the link to the flyer.

4. Enter any additional text you desire (such as “Please click this link to view an exciting property”).

5. Do the following to complete your email message:

   - Use the **Category** and **Template** drop-down lists, at the top of the page to choose a different message. Then click the **Use this template** link.
   - Click the **To** link to search for and highlight the contact(s) you want to send the flyer to.
   - Edit the **Subject** text, if you want to.
   - Click the **Attachments** link to add any additional files to the email. For more information on adding attachments, (see *“Sending Mass Email” on page 356*).
   - Select the **Include signature** check box to ensure your email signature, as set up in Agent setup, is included on the email message.
   - Click the **Insert picture merge code** link if you want to merge a picture into the email message. A pick list of merge codes opens for you to select from.
   - Click the **Insert merge code** link if you want to merge a piece of contact or agent information in

the email message. A pick list of merge codes opens for you to select from.

- Click **Insert flyer link** to add the flyer name as a hyperlink at the cursor point in the body of the email message.
- Click the **Insert marketing link** if you want to merge a marketing link into this message. The *Select marketing link* page opens for you to select the link from.
- Click the **Clear message** link to clear the contents of the email message so you can begin again. A dialog box appears to confirm that this is what you want to do. Click **Yes**.

6. Click **Next**.

   Top Producer checks the email addresses to ensure that they have the proper syntax and they do not have an unsubscribed email status. If there are any recipients with an unsubscribed email status, they are removed from the email and are displayed in a dialog box. Review this list and select the check box next to the contacts who you wish to add back to the email.

   The *View or edit email for [contact name and address]* page opens.

   - Click **Insert flyer link** to add the flyer name as a hyperlink at the cursor point in the body of the email message.
   - Click the **Insert marketing link** if you want to merge a marketing link into this message. The *Select marketing link* page opens for you to select the link from.

7. Click **Print** from the action menu to send the email message to the printer.

8. Make sure the email is correct, then click **Send** from the control menu. To change anything, click **Previous**.

   The flyer is published and an email containing the link is sent to the contact.

Printing a flyer

To print a flyer:

1. Follow the instructions in *“Creating A New Flyer” on page 379* until you get to the final step.

2. Select the **I want to print this flyer** option.

Note: Alternatively, highlight a previously created flyer from the *My flyers* page and click **Print** from the action menu.

3. Click **Finish**.

   The *Print* pop-up window opens.

4. Make sure the printer settings are correct, then click **OK** to print the flyer.

Note: If your flyers do not print correctly, see *"Printouts do not print correctly" on page 651*.

Viewing a flyer in Adobe Acrobat and Publishing a flyer to the Web

You can view your completed flyer in Adobe Acrobat, and then save the flyer onto your computer's hard drive in Adobe Acrobat Portable Document Format (PDF). You can then save the flyer to removable media such as a floppy disk, to give to your contacts.

To publish a flyer to the web and view it in Adobe Acrobat:

1. Follow the instructions in *"Creating A New Flyer" on page 379* until you get to the final step.

2. Select the **I want to publish this flyer to the web and view it in Adobe Acrobat** option.

3. Click **Finish**.

   The flyer is published and opens in Adobe Acrobat using your web browser.

4. To save the flyer to your hard disk or removable media, such as a floppy disk, click the icon.

Saving a flyer for later use

To save a flyer for later use:

1. Follow the instructions in *"Creating A New Flyer" on page 379* until you get to the final step.

2. Select the **I want to finish this flyer and print, send, or publish it later** option.

3. Click **Finish**.

   The *Create flyer* dialog box opens, informing you that you can view the flyer in printer format for printing, publish the flyer, or send the flyer later from the *My flyers* page.

4. Click **OK**.

Adding or removing a flyer from My favorites

Adding or removing a flyer from My favorites

For quick access to a flyer, you can add or remove a flyer from My favorites in the Category list.

To add a flyer to My favorites:

1. If you are creating a flyer, click **Add to favorites**.

   The flyer is added to My favorites in the Category list.

To Remove a flyer from My favorites:

1. In *Create a flyer*, select **My favorites** in the Category list.

   Thumbnails of all the flyers in the My favorites are displayed.

2. Select the flyer you want to remove.

3. Click Remove from favorites.

   The flyer is removed from My favorites.

Sending Flyers To Contacts

Top Producer 7i gives you complete flexibility in how you transmit your flyers to contacts. You can print them in the traditional manner for mailing, or you can publish them to the Web and email the link to your contacts.

When contacts view your published flyers they have the option of printing the flyer, instantly sending you an email or linking to your home page.

Sending an existing flyer

If you have flyers that you previously created, but did not send, you can use the Send flyer feature to forward your flyers to one or more contacts.

1. Point to **Flyers**, then click **My flyers**.

   The *My flyers* page opens.

2. Highlight the flyer you want to send, and then click **Send by email** from the action menu.

3. If the flyer has not yet been published, the *Flyers* dialog box asks you if you want to publish it now. Click **Yes** to proceed.

   The *Send by email* page opens.

4. Select the contact(s) to whom you want to send this flyer.

   - If the contact you want does not appear in the list, perform a search by **Listing**, **Name**, **Address**, **Contact type**, or **All contacts**. Click **Start search**.
   - Click **Add new contact** to create a new contact record.

Note: Click the **Total count** link beneath each column to see the total number of contact records in each of the lists.

5. Click **OK**.

The *Send flyer link* page opens. To continue, follow the steps outlined in *"Sending a new flyer link in an email" on page 381*.

The 'My Flyers' Page

The *My flyers* page lets you manage all of your flyers by providing the following functions:

- Creating new flyers (see *page 379*).
- Sending flyers (see *page 385*).
- Publishing flyers to a web page (see *page 387*).
- Printing flyers (see *page 382*).
- Viewing or editing flyers (see *page 388*).
- Adding flyers to the Marketing link library (see *page 389*).
- Deleting flyers (see *page 389*).

Accessing the My flyers page

To access the My flyers page:

1. Point to **Flyers**, then click **My flyers**.

   The *My flyers* page provides a list of flyers you have created, when they were created, flyer title and category, address they were created for, and whether they have been published.

Publishing flyers

Your subscription includes computer storage space in which you can publish flyers. To "send" the flyer to a contact, you email a link to the Web address of your flyer so the contact can view the flyer using their Web browsers.

To publish a flyer you have already created:

1. Select the flyer from the *My flyers* page and click **Publish**.

   The *Publishing flyer* dialog opens as the flyer is being published. Once published, the *Flyers* dialog box opens.

   The *Flyers* dialog box displays the URL address and enables you to download Adobe Acrobat.

2. To add the link to your marketing links library. Click **Yes**.

   The *Add to marketing links library* page opens. See *"Place a link in the marketing links library" on page 389*.

Viewing or editing flyers

To view or edit a flyer you have already created:

1. Point to **Flyers**, then click **My flyers**.

   The *My flyers* page opens displaying a list of all existing flyers.

2. Select a flyer from the list and click **View or edit** from the action menu.

   The *View or edit flyer* page opens.

3. Make any changes to the text, picture merge codes, merge codes or marketing links. For more information, (see *"Creating A New Flyer" on page 379*).

4. Click **Save**.

   The *Save flyer* dialog box opens.

5. To:

   - update the flyer with the changes you just made, click **Update existing**.
   - make a copy of the flyer that includes the changes you just made, click **Create new**. A new flyer containing your changes will be created, and the original flyer will remain untouched.

Previewing a flyer live

You can preview a completed flyer, to make sure it is ready to be sent out.

To live preview a flyer

1. Point to **Flyers**, then click **My flyers**.

   The *My flyers* page opens displaying a list of all existing flyers.

2. Select a flyer from the list and click **Live preview** from the action menu.

   A.PDF version of the flyer opens in a new window for you to view.

When you are finished previewing the item, close the browser window.

Place a link in the marketing links library

You can place a link to your published flyers in the Marketing links library.

To add a link to your flyer into the Marketing links library:

1. From the *My flyers* page, highlight a published flyer in the list.
2. Look in the **Published** column for the word, “Yes”. If the flyer has not yet been published, click **Publish** from the action menu.
3. Click **Add to marketing link library** from the action menu.

   The *Add to marketing link library* page opens. At the top of the page, the URL to the link is displayed as a hyperlink.
4. Select the category from the drop-down list that you want to save the marketing link to.
5. Type a name for the link in the text box.
6. Type a description for the link in the large text box.
7. Click **OK**.

Deleting a flyer

From the *My flyers* page you can easily delete the flyers you have created.

To delete a flyer you have already created:

1. Point to **Flyers**, then click **My flyers**.

   The *My flyers* page opens.
2. Highlight the flyer you want to remove.
3. Click **Delete** from the action menu.

   The *Delete flyers* dialog box opens.
4. Click **Yes** to confirm the deletion.

Managing Presentations

In this chapter:

About Presentations

The Presentations feature gives you everything you need to turn prospects into clients.

The types of presentations available are:

- **Comparative Market Analysis (CMA)** — a report for the seller that focuses on the subject property and provides a comparative analysis to homes in the surrounding area. This report is designed to familiarize the seller with the market prices in their area so they can price their home accordingly. For information on creating a CMA, see *"Creating a CMA" on page 409*.
- **Home Market Report (HMR)** — a report for someone who is considering selling their home in the near future. This report is a smaller version of the CMA, which can be created in a matter of minutes, and provides the potential prospect with an overview of the market in their area. For information on creating a HMR, see *"Creating a Home Market Report (HMR)" on page 413*.
- **Buyer presentation** — a report for the buyer that focuses on an analysis of homes in a particular area. This report is designed to provide the buyer with market prices in an area they have expressed interest in. For information on creating a buyer presentation, see *"Creating a buyer presentation" on page 414*.
- **Community Report** — a report for a buyer who wants a detailed analysis of the city in which they are thinking about buying a property. This report contains city reports (such as, city population, income, age, and employment), school reports (such as, education levels, educational trends and student to teacher ratio) and crime statistics (such as, types of crime and crime trends). For more information on creating a Community Report, see *"Creating a Community Report" on page 416*.

All presentation types come with a pre-written library of customizable templates that can be quickly modified to create presentations for targeting specific prospects, homes and markets.

When you've created your presentation, you can print it, Web publish it and email the link, or save it as an Adobe Acrobat Portable Document Format (PDF) file onto your hard drive or portable media such as a floppy disk.

If you have access to a Multiple Listings Service (MLS) board, you can download comparable properties and automatically integrate them into your presentations. If you do not have access to MLS, you can manually enter your comparables.

Working With The Presentation Library

Top Producer 7i comes with ready-made presentation templates that you can use immediately. However, you may want to create your own customized presentations to suit your particular style.

While you can create presentation pages from scratch, the easiest way to create personalized presentation templates is to use the default presentation pages supplied with the default presentation templates.

The Presentation library enables you to create new presentation templates for your personalized categories. You can:

- Modify a presentation template (see *page 394*).
- Create a new presentation template (see *page 396*).
- Create new pages for the presentation (see *page 401*).
- Set page stationery (see *page 398*).
- Customize pages and add theme graphics (see *page 408*).
- Rename presentation pages (see *page 397*).
- Delete presentation pages (see *page 397*).

This information is discussed in the Mail chapter, (see *"New presentation templates" on page 300*).

Accessing the presentation library

To access the Presentation library:

1. Point to **Presentations**, then click **Presentation library**.

   The **Presentations** tab opens.

Working with presentation template categories

Presentation templates are stored in template categories. The pre-written templates (that you cannot modify) are stored in the default **Standard presentations** category.

Presentations that you have customized or created from scratch are stored in personal template categories. You can add, rename, and delete these personal presentation template categories.

Note: To find out if a category is a default one, select the category, then look to the right. If you've selected a default category, the following sentence appears: **This is a default category**. If you've selected a personal category, the following sentence appears: **This is a personal category**.

For information on working with template categories, see *"Working With Template Categories" on page 294*.

Working with presentation templates

Top Producer 7i comes with ready-made presentation templates that you can use immediately. However, you may want to create your own customized presentations to suit your particular style.

When you create a new template, you are starting from scratch with blank pages. You can then copy and edit pages from existing templates into your new template (which saves time), or you can create your own pages from scratch.

You can only create new templates in a personal category that you've created yourself.

For information on viewing, creating new, renaming, and deleting presentation templates, see *"New presentation templates" on page 300*.

About presentation merge codes

Presentations have their own special merge codes that can be used to insert information such as average list price, average price per square foot, etc.

The presentation-specific merge codes are prefixed by "CMA", and are available for each of the comparable types (listings, pendings sales, recent sales and expireds).

There are also presentation-specific picture merge codes that can be used to insert charts or maps.

Viewing or editing presentation templates

The easiest way to create a personalized template is to use pages from the default templates. While you cannot change the templates in the default categories, if you edit them you will be prompted to save the edited template into a personal category.

To edit a presentation template:

1. Point to **Presentations** and then click **Presentation library**.

   The *Presentations* page opens.

2. From the **List of categories** drop-down list, select a category.

   The templates belonging to the category you selected appear in the list.

3. Highlight the template you want to view and/or edit in the list, then click **View or edit** from the action menu.

   The *Pages in [template name] template* page opens.

4. From this page you can:

   - **rearrange the template's page sequence** — select the page you want to move up or down in the list, then click either the **Move up** or **Move down** link at the bottom of the page until the page is positioned where you want it.
   - **view or edit a specific page** — select the page you want to edit, then click **View or edit** from the action menu. Make any changes, insert text or picture merge codes, or insert comparables. Click **OK**. See *"Editing presentation pages" on page 438*.
   - **create a new page** — click **Create new** from the action menu. Design a new page for the presentation by using the word processor, inserting text or picture merge codes, or by inserting comparables. Click **OK**. See *"Creating a new presentation page" on page 300*.
   - **add an existing page from the template** — click **Add from template** from the action menu. The *Add pages from a template* page opens. Select the category, template, and page(s) you want to add. Click **OK**. See *"Adding pages from a presentation template" on page 302*.
   - **rename a page** — select the page you want to rename, then click **Rename** from the action menu. The *Rename [page name] page in [template name] template* pop-up window opens. Type a new name, then click **OK**. See *"Renaming a presentation page" on page 304*.
   - **set the page's stationery** — select the page you want to apply stationery to, then click **Set page stationery** from the action menu. The *Set page stationery* pop-up window opens. Choose an option and click **OK**. See *"Setting page stationery" on page 303*.
   - **apply customized stationery to the template** — click **Customize stationery** from the action

menu. Design a cover page and/or presentation page for the template by inserting graphic themes, text or picture merge codes. Click **OK**. See *"Creating A New Presentation" on page 409*.

- **delete a page** — select the page you want to delete, then click **Delete** from the action menu. The *Delete page(s)* dialog box opens. Click **Yes**. See *"Deleting a presentation page" on page 304*.

Note: If you make changes to a read-only default template, the *Modify [name] template from [default category] category* message box will prompt you to enter the new template name and choose the personal category to save it in.

---

5. Click **Close**.

Creating a new presentation template

To create a new presentation template:

1. Point to **Presentations** and then click **Presentation library**.

   The *Presentations* page opens.

2. Click **Create new** from the action menu.

   The *Create new template* pop-up window opens. For detailed instructions, see *"New presentation templates" on page 300*.

Copying a presentation template

To copy a presentation template:

1. Point to **Presentations** and then click **Presentation library**.

   The *Presentations* page opens.

2. Click the **List of categories** drop-down list and choose a category.

3. Highlight a template you want to copy from the list.

4. Click **Copy** from the action menu.

Note: If you choose a read-only default template to copy, you will be prompted to specify a personal category and new template name.

The *Copy template [template name] from [category name] category* pop-up window opens.

5. The **New template name** text box displays the existing name with (**1**) appended to it. You can accept this suggested name or type a new one.

6. In the **Copy to category** list, highlight the category in which you want to save the template copy.

7. Click **OK**.

Renaming a presentation template

To rename a presentation template:

1. Point to **Presentations** and then click **Presentation library**.

   The *Presentations* page opens.

2. Click the **List of categories** drop-down list and choose a category.

3. Highlight a template you want to rename from the list.

4. Click **Rename** from the action menu.

   The *Rename [template name] template in [category name] category* pop-up window opens.

5. Enter a new name for this template, and click **OK**.

Deleting a presentation template

To delete a presentation template:

1. Point to **Presentations** and then click **Presentation library**.

   The *Presentations* page opens.

2. Click the **List of categories** drop-down list and choose a category.

3. Highlight a template you want to rename from the list.

4. Click **Delete** from the action menu.

   The *Delete [template name] template from [category name] category* pop-up window opens.

5. Click **Yes** to confirm deletion of the template.

Setting up/ customizing presentation stationery

The presentation *stationery* defines the look of your presentations; the background, header and footer graphics, company logo, etc.

You can set the default stationery that presentations you create will use, and you can also change the stationery for individual presentations when you edit them.

Note: You can only change the stationery in personal categories, not default categories.

To modify the default presentation stationery:

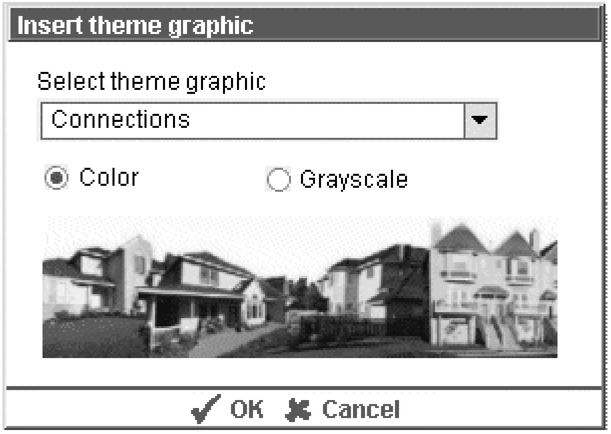
1. Point to **Presentations**, then click **Presentation library**.
2. Click the **Presentations** tab and click **Default stationery setup** from the action menu.

Note: Default stationery affects the personal presentations you create; it does NOT apply to the presentations in the default categories.

3. There are two tabs on this page: **Cover page** and **[Presentation type] page**.
   - click the **Cover page** tab to setup stationery for the presentation cover page.
   - click the **[Presentation type] page** tab to set stationery for all other pages in the presentation.
4. Use the word processor to edit the presentation pages as necessary.

   For more information on using the word processor, see *"Using the word processor" on page 306*.

5. Click the **Insert theme graphic** link to select the background graphic used throughout the presentation.



6. From the *Insert theme graphic* pop-up window, click the **Select theme graphic** drop-down list to select a graphic style (for example, **Connections**, **Country life**, **Garden**, etc.).

   A preview of the selected style is displayed.

7. Select either the **Color** or **Grayscale** option.

Note: It is recommended to use a color graphic for the cover page and a grayscale graphic for the other pages.

---

8. Click **OK**.

Note: The standard presentation page (the page you view under the **Presentation page** tab) includes a merge code for an agent disclaimer at the bottom the page (the name of the merge code is **Agent.disclaimer**). If you have set your general preferences to include a presentation disclaimer, your disclaimer will be displayed here when the presentation is produced. Otherwise, it will be left blank. See *"Setting General Preferences" on page 102*.
If you want to use a different disclaimer on your presentations, erase this merge code and type a disclaimer manually.

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9. Click the **Insert picture merge code** link to automatically merge a picture into the template.

A pick list of merge codes opens for you to select from.

10. Click the **Insert merge code** link to merge a piece of contact or agent information when printing this item.

    A pick list of merge codes opens for you to select from.

11. Click **OK** when you are finished setting up stationery.

To modify the stationery for a personal presentation template:

1. Point to **Presentations**, then click **My presentations**.

2. Highlight a presentation from the *Presentations* page.

3. Click **View or edit** from the action menu.

   The *[Presentation type] for [buyer name/seller name]* page opens.

4. Click **View or edit presentation** from the action menu.

5. From the *[Presentation type] for [property address]* page, click **Customize stationery** from the action menu.

   The *Customize stationery for this presentation* page opens with two tabs: **Cover page** and **[Presentation type] pages**.

6. Click one of the following:

   - **Cover page** tab to setup stationery for the presentation cover page.
   - **[Presentation type] pages** tab to set stationery for all other pages in the presentation.

7. Use the word processor to edit the presentation pages. For more information on using the word processor, see *"Using the word processor" on page 306*.

8. Click the **Insert theme graphic** link to select the background graphic used throughout the presentation. See step 5 in *"To modify the default presentation stationery:" on page 398*.

9. Click the **Insert picture merge code** link to automatically merge a picture into the template.

   A pick list of merge codes opens for you to select from.

10. Click the **Insert merge code** link to merge a piece of contact or agent information when printing this item.

    A pick list of merge codes opens for you to select from.

11. Click **OK**.

Working with presentation template pages

The easiest way to create a personalized template is to use pages from the default templates. You can also create new pages, add pages from existing templates, specify custom stationery and more.

To access a template's pages:

1. Point to **Presentations** and then click **Presentation library**.

   The *Presentations* page opens.

2. From the **List of categories** drop-down list, select a category.

   The templates belonging to the category you selected appear in the list.

3. Highlight a template you want to work with from the list.

4. Click **View or edit** from the action menu.

   The *Pages in [template name] template* page opens.

Viewing or editing presentation template pages

1. To edit a specific template page, select the page you want to edit.

2. Click **View or edit** from the action menu.

   - If you are modifying a default template you will be prompted to specify a personal category and template name to save the modified template under. After specifying this information, click **View or edit** again to continue modifying the desired pages.

The *View or edit [page name] page in [template name] template* page opens.

3. Edit the page as necessary:

   - Use the word processor to format the content, (see *“Using the word processor” on page 306*).
   - Click the **Insert comparables** link to insert comparables into the template page, (see *“Inserting and editing comparable templates” on page 402*).
   - If you have comparables inserted into the template page, click the **View or edit comparable** link to modify them, (see *“Inserting and editing comparable templates” on page 402*).
   - To add maps or charts, click the **Insert picture merge code** command. A pick list opens, letting you select a category and related picture merge code.
   - Click the **Insert merge code** link to open a pick list of available merge codes. Click the drop-down list to choose a category.

4. Click **OK**.

5. If you have not already done so, enter a new template name and choose the personal category to save it in the *Modify [name] template from [default category] category* message box, then click **OK**.

   The *Pages in [template name] template* page opens.

6. Click **Close** to finish editing the template.

Inserting and editing comparable templates

When editing presentation pages (either in an existing presentation or a template), the word processor includes special functions that allow you to insert comparable templates and edit their format. For more information, see *“Using the word processor” on page 306*.

These comparable templates contain merge codes, and when you use the template to create a presentation for a contact, the merge codes are filled in with information downloaded from your MLS (see *“Downloading comparables from an MLS board” on page 422*) or entered manually (see *“Entering comparables manually” on page 426*).

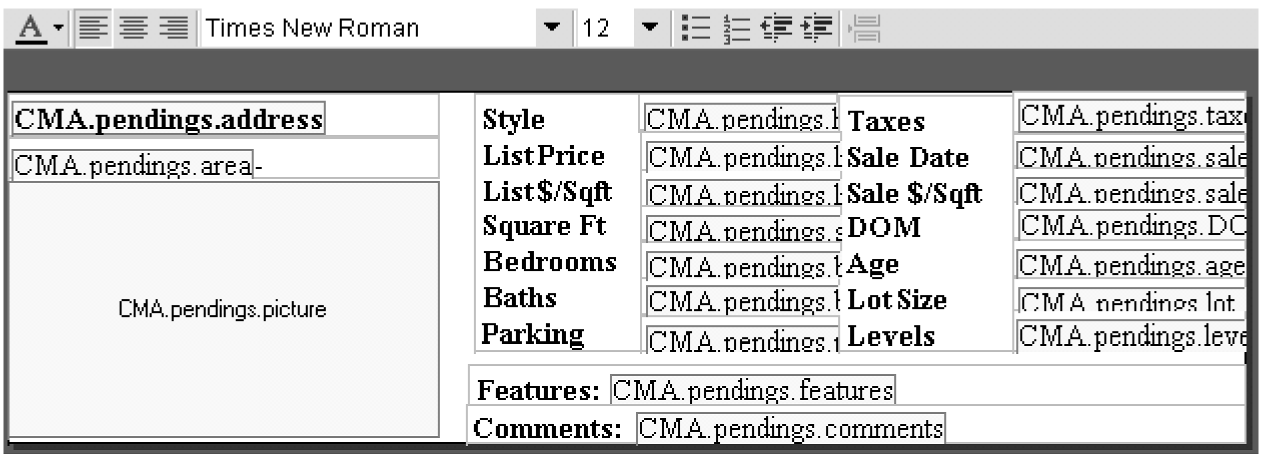
You can create your own comparables from scratch, but the easiest way to add comparables is to copy and edit a comparable from one of the default templates.

To edit comparable templates:

1. Edit a presentation or template page that contains a comparable template (these will usually be named **Current listings**, **Recent sales**, **Pending sales**, or **Expired listings**), following the instructions in *"Editing presentation pages" on page 438*, *"Inserting and editing comparable templates" on page 402*. For information on copying comparable templates from one of the default templates, see *"Copying pages from an existing template" on page 407*.

2. From the *View or edit [page name] page in [template name] template* page, click **View or edit comparable**.

   The comparable's merge codes and text are displayed.



3. Edit the comparable as desired. You can delete unwanted merge codes and text descriptions, or add merge codes (using the **Insert merge code** commands) and text as needed.

For more information on using the word processor, see *"Using the word processor" on page 306*, and for more information on editing comparable templates, see *"Editing comparable templates" on page 405*.

4. Click **Close** when you are finished editing the comparable.

   The *View or edit [page name] page in [template name] template* page reopens.

5. You can adjust the area that the comparables are displayed in by moving the handles around the comparables. The number of comparables per page is automatically adjusted to fit within the defined border.

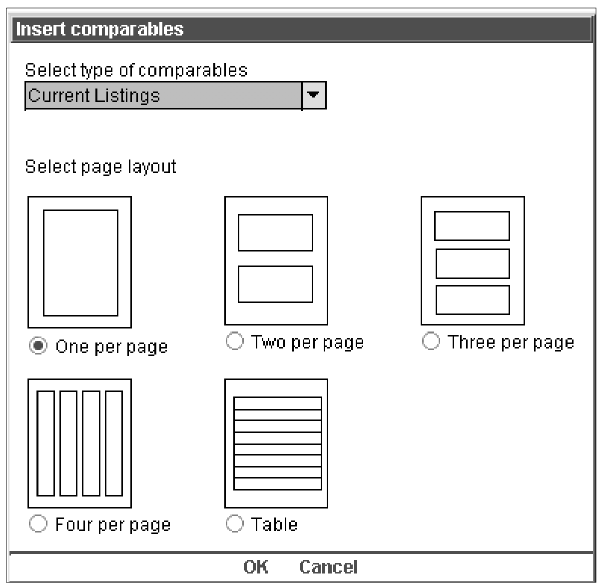
6. Click **OK** when you are finished adjusting the comparable layout.

To create your own comparable template:

1. Edit a presentation or template page, following the instructions in *"Editing presentation pages" on page 438*, and *"Inserting and editing comparable templates" on page 402*. Usually you will want to create and edit a blank page to place the comparable template on.

2. From either the *View or edit [page name] page in [template name] template* page, or the *Create new page in [template name] template* page, click the **Insert comparables** link from the bottom of the page.

   The *Insert comparables* pop-up window opens.



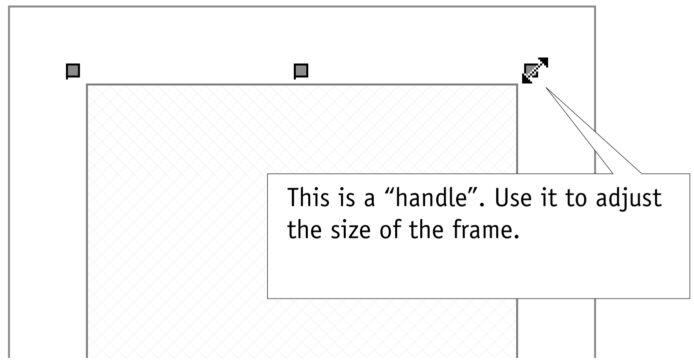
3. Select the type of comparables you want to insert from the **Select type of comparables** drop-down list.

4. Select the page layout, based on how many comparables you want to appear on each page. If you want to include property photographs, ensure that you allow enough space in each comparable. If you are not including property photographs, you may wish to use the **Table** option.

5. Click **OK** to insert the comparable template.

Editing comparable templates

1. You can adjust the size of the comparable frame by dragging the “handles”.



The number of comparables per page is automatically adjusted to ensure that the comparables will fit inside the comparable frame. So, if you choose 2 comparables per page but then make the comparable frame smaller, the number of comparables used per page will change to 1 per page.

2. Click **View or edit comparable**.

The *Edit comparable* page opens.

Note: The *Edit comparable* page edits the individual comparables that will be repeated across the page (depending on the number of comparables per page chosen, and the size of the comparable frame).

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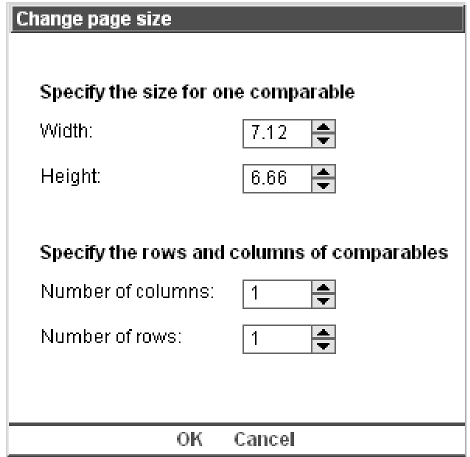
3. To adjust the size of the individual comparables, click **Change page size** from the action menu.



4. Enter the following:

   - **Width** and **Height** of the comparable in inches, or use the spin buttons
   - **Number of columns** and **Number of rows**, or use the spin buttons

5. Click **OK**.

   Now that you have created a comparable template, you should insert text or picture merge codes into the comparable, (see *"Using the word processor" on page 306*).

6. Click the **Insert picture merge code** or **Insert merge code** links, select a merge code from the pick list and click **OK**.

   Take note of the following points:
   - When you insert merge codes, they are inserted inside text boxes.
   - When a merge code is inside a text box, the merged information may exceed the size of the text box. Since the text box will not be resized automatically, the result is that merged information can later appear to be "missing" from the page. You must manually resize the text box to accommodate the merged information.
   - Only the relevant comparable merge codes can be inserted. You cannot insert merge codes such as average list prices (for example **CMA.avg_list_price_sales**) into individual comparables. Place merge codes like this into the presentation page next to the comparable frame.

- You cannot type text straight into the comparable. Click the **Insert text box** icon and type text into the text box, or type into the text boxes inserted along with merge codes.

7. Click **Expand box to fit merged text** from the action menu to be able to resize the text box.

> **Note:** You must click on the text box to select it before you can resize it.

8. Click **Keep box dimensions** from the action menu to maintain the text box size.

9. When you have finished editing the comparable template, click **Close**.

Creating a new presentation page

For details on adding a new presentation page to a template, see *"Creating a new presentation page" on page 300*.

Copying pages from an existing template

1. To add one or more pages from an existing template, click the **Add from template** action menu item.

   If you are modifying a default template you will be prompted to specify a personal category and template name to save the modified template under. After specifying this information, click **Add from template** again to continue adding the desired pages.

2. From the **Select category** drop-down list, specify a category.

3. From the **Select template** drop-down list, specify a template.

   The pages belonging to the category and template you selected are displayed in the list.

4. Select the pages you want to add to the new template, then click **OK**.

Renaming a presentation page

For details on renaming an existing page in a presentation template, see *"Renaming a presentation page" on page 304*.

Setting page stationery

For details on specifying page stationery to selected pages in the template, see *"Setting page stationery" on page 303*.

Customizing page stationery for a template

For details on adding themes to design your own custom stationery to apply to your template, see *"Customizing pages and adding theme graphics" on page 303* and *"Setting up/ customizing presentation stationery" on page 398*.

Deleting a presentation page

For details on removing a page from your presentation template, see *"Deleting a presentation page" on page 304*.

Creating A New Presentation

You can create the following types of presentations:

- Comparative Market Analysis (CMA), see *page 409*.
- Home Market Report (HMR), see *page 413*.
- Buyer presentation, see *page 414*.
- Community report, see *page 416*.

For information about these presentation types, see *"About Presentations" on page 391*.

If you are a new or relatively new user, you will generally use the pre-designed presentation templates provided. However, as you become increasingly familiar with the program, you will find it easy to custom-create your own library of presentation templates and then select the template appropriate for the specific seller, home and market conditions. For information on creating your own templates, see *"New presentation templates" on page 300*.

Creating a CMA

When you create a new presentation, you'll:

- select a template.
- select the seller and their property from your contact list.
- search for and add comparables from your MLS (if you use MLS), or add comparables manually.
- edit the comparables as necessary (for example by entering price adjustments).
- enter any relevant subject property statistics, that are not already in the seller's contact record.
- determine a recommended price.

After creating the presentation, you'll view the finished product in the word processor where you can modify individual presentation pages, and email, print, or Web-publish the presentation. You can also export the CMA data to Top Presenter 2.0 where you can prepare a multimedia presentation. See *"Exporting CMA Presentation Data To Top Presenter 2.0" on page 447*.

To create a new CMA presentation:

1. From the **Presentations** menu, under **Create presentation**, click **CMA**.

- If you are using an MLS and have not yet set up your MLS information, click **Yes** in the *MLS Access* page. See *"Setting Up Top Connector 7i" on page 80*. When you have set up your MLS, continue to the next step.
- If you are not using an MLS, click **No**. If you do not want to be prompted to setup MLS information in the future, select the **Do not remind me again** check box before clicking **No**.

The *Create CMA - Select template* page opens.

2. Click the **CMA** option button.

3. From the **Template Category** drop-down list, select a template category.

   The templates belonging to the specified category appear in the **Template name** list.

4. Highlight a template, then click **Next**.

Note: If you are creating a presentation directly from the Address book, you will already have selected a contact. In this case, skip to step 6.

The *Create CMA - Select subject property* page opens. This page lets you select a subject contact and property.

5. To search for the seller by their:

   - name, select the **Name** option button. Specify a first and/or last name (you may type either the full name or just the first few letters), then click **Start search**.
   - property address, select the **Address** option button. Enter information in one or more of the address related text boxes, then click **Start search**.

   Sellers matching your search criterion appear in the list.

6. Highlight the seller, then click **Finish** (if you are entering comparables manually) or **Next** (if you are downloading comparables from MLS).

Note: The seller's contact record must contain at least a property address. If you have not entered an address for this contact, click **View or edit contact**, then click the

Address details tab and enter the property address information.

7. Then,

   - if you are not using MLS and will enter the comparables manually, follow the instructions in *“Entering comparables manually” on page 426*.
   - if you will download/import comparables from MLS, follow the instructions in *“Downloading comparables from an MLS board” on page 422*.

The CMA for [seller name] page

Updating property statistics

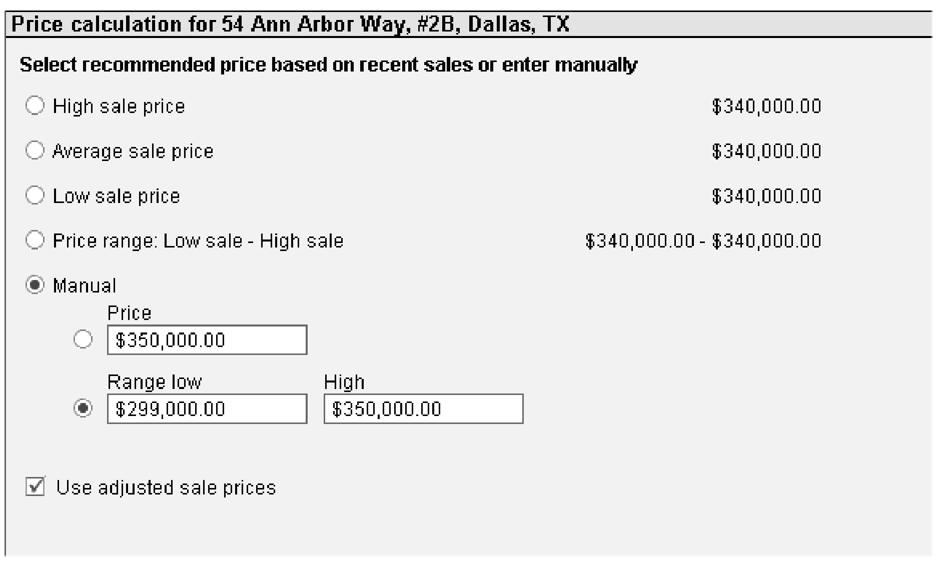
If the seller’s contact record already contains this information, these fields will already contain the data.

Click the **Subject property statistics** link and enter as much information as you can, then click **Close**.

Determining a recommended price

1. Click the **Recommended price** link.

   The *Price calculation for [property address]* page opens.



   - To use either the **High**, **Average**, **Low**, or **Low-to-High price range** options, select the appropriate option button. Prices are calculated based on the recent sale prices from your comparables.
   - If you want to manually specify a price or price range, select the **Manual** option button, then select the appropriate option button below. Type the prices in the text boxes. (For example, if you

want to specify a low-to-high price range, type the low price in the **Range low** text box and the high price in the **High** text box.)

- Select the **Use adjusted sale prices** check box to automatically calculate the **High**, **Average**, **Low**, or **Low-to-High price range** values based on the adjusted sale prices. Clear the check box to calculate prices based on the sale prices (without adjustments).

2. Click **OK**.

Viewing, adding, or editing comparable properties

1. You can determine what column headings you see in the **Comparable properties** grid.

   - click the **Column settings** link to display a pop-up window with a list of all available headings.
   - select any number of field name check boxes in the **Display** column. The check boxes showing a check mark will be visible in the grid.
   - click the **Move up / Move down** links to set the order of the field names in the grid.
   - click **OK**. See *"Reordering and sorting the comparables list" on page 429*.

2. Click the **View by status** drop-down list, located to the right of the page, to choose the type of comparable properties viewed.

3. You can now add or review (and if necessary, adjust) the comparables in the bottom part of the page. See *"Viewing or editing comparables" on page 428*

4. Using the action menu items, you can do the following:

   - View or edit the presentation, (see *page 437*).
   - Print the presentation, (see *page 440*).
   - Send the presentation via email, (see *page 442*).
   - Save the presentation as a local file on your computer, (see *page 445*).
   - Download comparables from an MLS board, (see *page 422*).
   - Preview maps, (see *page 419*).
   - Configure charts, (see *page 420*).
   - View or edit the contact's details (see *page 132*).

- Send this CMA to Top Presenter 2.0, (see *page 447*).
- Delete the presentation, (see *page 421*).

5. Click **Close**.

Creating a Home Market Report (HMR)

When you create an HMR, you will:

- select a template.
- select the contact and property you are creating the presentation for.
- search for and add comparables from your MLS (see *page 422*), or add comparables manually (see *page 426*).
- edit the comparables as necessary, for example by entering price adjustments (see *page 428*).
- enter any relevant subject property statistics, that are not already in the seller's contact record.
- determine a recommended price.

To create an HMR:

1. From the **Presentations** menu, under **Create presentation**, click **Home Market Report**.

   The *Create [Presentation type] - Select template* page opens.

2. Select the **Home Market Report** option button.

3. Select the category that contains the presentation template you want to use from the **Template Category** drop-down list.

   The templates belonging to the specified category appear in the list below.

4. Select a template from the list, then click **Next** from the control menu at the bottom of the page.

Note: If you are creating an HMR from the Address book, you will already have selected the subject property. In this case, skip to step 6.

The *Create Home Market Report - Select subject property* page opens.

5. Select the contact and property you are creating the presentation for from the list.

   To search for a contact by their:

   - name, select the **Name** option button, then enter the first and/or last name in the appropriate text boxes. Click **Start search**. Select the contact from the list below.
   - address, select the **Address** option button, then enter full or partial address information in the appropriate text boxes. Click **Start search**. Select the contact from the list below.

6. Click:

   - **Finish** from the control menu if you are entering comparables manually.
     For more information on entering comparables, see *"Entering comparables manually" on page 426*.
     For more information on working with the *Home Market Report for [seller name]* page, see *"The CMA for [seller name] page" on page 411*.
   - **Next** from the control menu if you want to download comparables from your MLS board. You need to subscribe to Top Connector 7i in order to do this.
     For more information on downloading comparables from your MLS board, see *"Downloading comparables from an MLS board" on page 422*.
     For more information on working with the *Home Market Report for [seller name]* page, see *"The CMA for [seller name] page" on page 411*.

Creating a buyer presentation

When you create a new buyer presentation, you will:

- select a template.
- select the buyer from your contact list.
- search for and add comparables from your MLS (if you use MLS), or add comparables manually.

After creating the presentation, you'll view the finished product in the word processor where you can add, modify, and delete comparables, modify individual presentation pages, and email, print, or Web-publish the presentation.

To create a new buyer presentation:

1. From the **Presentations** menu, under **Create presentation**, click **Buyer Presentation**.

- If you are using an MLS and have not yet set up your MLS information, click **Yes** in the *MLS Access* page. See *"Setting Up Top Connector 7i" on page 80*. When you have set up your MLS, continue to the next step.
- If you are not using an MLS, click **No**. If you do not want to be prompted to set up MLS information in the future, select the **Do not remind me again** check box before clicking **No**.

The *Create Buyer Presentation - Select template* page opens.

2. Click the **Buyer presentation** option button.

3. From the **Template Category** drop-down list, select a template category.

   The templates belonging to the specified category appear in the list.

4. Highlight a template from the list, then click **Next**.

   The *Select contact* page opens.

Note: If you are creating a presentation directly from the Address book, you will have already selected the buyer. In this case, skip to step 6.

Search for and select the buyer

5. To search for the buyer by their:

   - name, select the **Name** option button. Specify a first and/or last name (you may type either the full name or just the first few letters), then click **Search**.
   - address, select the **Address** option button. Enter information in one or more of the address related text boxes, then click **Search**.

   Contacts matching your search criterion appear in the list.

6. Highlight the buyer, then click **Finish** (if you are entering comparables manually) or **Next** (if you have an MLS board set up).

7. Then,

   - if you are not using MLS and will enter the comparables manually, follow the instructions in *"Enter-*

ing comparables manually" on page 426. After you have entered the comparables, continue to step 8.

- if you will download/import comparables from MLS, follow the instructions in *"Downloading comparables from an MLS board" on page 422*.

The Buyer presentation for [buyer name] page

1. You can determine what column headings you see in the **Comparable properties** grid.

   - click the **Column settings** link to display a pop-up window with a list of all available headings.
   - select any number of field name check boxes in the **Display** column. The check boxes showing a check mark will be visible in the grid.
   - click the **Move up / Move down** links to set the order of the field names in the grid.
   - Click **OK**. See *"Reordering and sorting the comparables list" on page 429*.

2. Click the **View by status** drop-down list, located in the top right of the page, to choose the type of comparable properties viewed.

3. You can now review (and if necessary, adjust) the comparables from this page. See *"Viewing or editing comparables" on page 428*.

4. Use the action menu items to:

   - View or edit the presentation in the word processor, (see *page 437*).
   - Print the presentation, (see *page 440*).
   - Send the presentation via email, (see *page 442*).
   - Save as a file, (see *page 445*).
   - Download comparables from an MLS board, (see *page 422*).
   - Preview maps, (see *page 419*).
   - Configure charts, (see *page 420*).
   - View or edit the contact's details (see *page 132*).
   - Delete the presentation, (see *page 421*).

5. Click **Close**.

Creating a Community Report

When you create a Community Report, you can use the predesigned presentation templates or you can use one of your custom-made templates. After creating a Community Report, you can modify individual presentation pages, and email, print, or Web-publish it.

To create a presentation:

1. On the **Presentations** menu, next to **Create presentation**, click **Community Report**.

   The wizard starts and guides you through the process of creating a Community Report.

2. From the **Template Category** drop-down list box, select the category that contains the template you wish to use.

3. Select a template from the list and click **Next**.

   Use the Presentation preview feature to examine the available templates and choose the right one for your current task.
   - If you select a Community Report, the report will include a map of your selected amenities.
   - If you select a School Report or a Community and School Report, the report will include a map of your selected schools.

4. Select the contact for whom you are creating this presentation. To refine the list of properties/ contacts, specify a search criteria:

   - Click an option button to select whether to search for the subject property/buyer by **Name** or **Address**. Enter your search criteria and click **Start search**.
   - To display all contacts in the database, click **Start search** without entering any search criteria.

Tip: If your contact does not have an address, click the **View or edit contact** menu item, enter an address, and then click **Close**.

5. Click **Next**.

6. Enter the zip code of the subject community. If you do not know the zip code, use the **Zip Look-up**:

a) Click **Zip Look-up**.

b) From the **State** drop-down list box, select the community's state.

c) Select the **ZIP**, **City**, or **County** radio button and then enter the search criteria in the space provided

d) Click **Start search**.

e) Select the zip code of your community and click **OK**.

7. Enter the zip code of the comparison community. If you do not know the zip code, use the **Zip Look-up**.

Note: If you do not select a comparison community at all, the community you selected will be compared against the state as a whole.

---

8. When you have determined both of your community zip codes, click **Start search**.

   A listing of available amenities, including schools, is displayed in the **Amenities** area.

9. From this point, the wizard changes depending on the type of template you're using:

   - If you selected a Community Report template, carry on with *step 10*.
   - If you selected a School Report or a combined Community and School Report, use the following procedure.

a) To adjust the radius of the amenities search, use the **Include amenities** drop-down list box and click **Start search** again.

Note: The search radius is measured from the middle of the zip code area, not from the address of the contact.

---

b) Select the categories and types of amenities you want in the report by selecting their check boxes.

c) When you are finished selecting your amenities, click **Next**.

d) If you entered a comparison community, you can select up to three schools from your subject community and three from your comparison community. If you didn't select a comparison community, you can select up to six schools from your subject community.

e) Click **Make report**.

10. To adjust the radius of the amenities search, use the **Include amenities** drop-down list box and click **Start search** again.

Note: The search radius is measured from the middle of the zip code area, not from the address of the contact.

11. Select the categories and types of amenities you want in the report by selecting their check boxes.

12. Use the **Selected amenities** link corresponding to each amenity type to select the specific amenities that will appear on the community map. You can select up to 10 amenities per category.

13. Click **Make report**.

Previewing presentation maps

The presentation templates contain map merge codes that display the locations of subject and comparable properties.

To preview maps that will appear in the presentation:

1. From the *[Presentation type] for [buyer/seller name]* page, click **Preview maps** from the action menu.

   The *[Presentation type] maps for [property address]* page opens.

2. Click the **Select map to preview** drop-down list, and select the map you want to preview.

3. Click **Close** when you are done previewing the maps.

Note: To insert maps into presentation templates, use the **Insert picture merge code** command in the word processor. See *"Using the word processor" on page 306*.

Configuring presentation charts

Some of the presentation templates contain charts which graphically compare the prices of comparable properties. You can adjust which comparable properties are displayed in the charts, and preview charts as follows.

To configure charts:

1. From the *[Presentation type] for [buyer/seller name]* page, click **Configure charts**.

   The *[Presentation type] charts for [property address]* page opens.

2. The left side of the screen previews selected charts using your comparable data. To view different charts, select them from the **Select chart to preview** drop down list. You can select:

   - **Visual market analysis** (default)
   - **Average days on market**

3. Select one or more of the **Select comparable types to be displayed in charts** check boxes to specify which comparable types you want displayed in charts. Use the **Check all** and **Uncheck all** links to quickly select and de-select all comparable types.

4. The order in which comparable types are listed determines the order in which they are displayed in charts. To rearrange the order in which comparables are displayed in charts, select comparable types and click the **Move up** or **Move down** links.

5. To preview the chart with your new selections, click **Update charts**.

6. Click **Close**.

Note: To insert charts into presentation templates, use the **Insert picture merge code** command in the word processor. See *"Using the word processor" on page 306*.

Deleting a presentation

Since you can NOT retrieve deleted presentations, make absolutely sure you no longer need the presentation before deleting it.

Note: If you delete a presentation from My presentations that has been published to the Web, it will be deleted from My presentations but will NOT be removed from the Web.

To delete a presentation while viewing it:

1. From the *[Presentation type] for [buyer name/seller name]* page, click **Delete presentation** from the action menu.

   The *Delete presentation* dialog box opens.

2. Click **Yes** to continue.

Working With Comparables

This section tells you how to:

- download comparables from an MLS board (see below).
- enter comparables manually (see *page 426*).
- view or edit comparables (see *page 428*).
- reorder and sort the way comparables are displayed (see *page 429*).
- add an adjustment to a comparable (see *page 430*).
- modify an adjustment (see *page 432*).
- delete an adjustment (see *page 434*).

Downloading comparables from an MLS board

In order to download comparable data into your presentations, you must first set up Top Connector 7i. For more information, see *"Setting Up Top Connector 7i" on page 80*.

You will download comparable data using either:

- a Direct search module (see *page 422*).
- an Import module (see *page 424*).

For information on how to determine the module type you have, see *"Determining which module type you have" on page 80*.

Downloading comparable data using a Direct search module

Note: If you are creating a presentation, skip to step 4.

1. From the main menu, point to **Presentations** and then click **My presentations**.

   The *Presentations* page opens.

2. Select the presentation you want to download comparables to, then click **View or edit** from the action menu.

3. From the *[Presentation type] for [buyer/seller name]* page, click **MLS import** or **MLS Search** from the action menu.

Note: The **MLS import** action menu item is displayed when you have at least one searchable module in the TOP CONNECTOR setup screen. A searchable module is searchable when you require a login screen. Otherwise, the MLS Search action menu item is displayed.

Refer to the search tips at the top of the page for information on the types of searches you can perform.

4. Enter your search criteria. If you want to append the results from a previous search with the results of a new search, select the **Append to previous search results** check box.

Note: Some boards have required fields that must have values in order for a search to be processed. If an asterisk (*) is displayed by the field name, the field is required. All fields without an asterisk are optional.

5. Click **Next**.

   Your search results are displayed on the next page. If no matches are found, perform the search again using new search criteria.

You can rearrange the order of the comparables columns by clicking and dragging them. These settings are retained for each board.

6. To view properties by type, specify a type from the **View** drop-down list.

7. Select the properties you want to include in your presentation by selecting the appropriate check box(es).

8. To include pictures for the selected properties, click **Get pictures for selected** from the action menu.

9. Click **[Save / Make] [presentation type]** from the control menu.

Note: If you are working with an HMR, you can click **Send HMR** from the control menu to send the presentation to selected contacts. For more information on sending an HMR, see *step 4 on page 443*.

   The *[Presentation type] for [buyer name/seller name]* page opens.

10. You can now adjust the comparables. See *“Viewing or editing comparables” on page 428*.

Downloading comparable data using an Import module

In order to import comparable data into your Top Producer 7i presentation, you must perform a search in your MLS software, then save the search results to a location on your hard drive, which will later be imported into Top Producer 7i. Make note of this location because you will need to know this in order to import the file into your presentation.

1. Perform a search using your MLS board software.

   For specific instructions on how to perform a search in your MLS board software, go to www.topproducer.com.

   From the **Support** menu, select **Top Connector Support**.

   On this page you will find individual TOP CONNECTOR 7i manuals for all of the major Import modules.

2. Close your MLS board software and start Top Producer 7i.

> **Note:** If you are creating a presentation, skip to step 6.

3. From the main menu, point to **Presentations** and then click **My presentations**.

   The *Presentations* page opens.

4. Select the presentation you want to download comparables to, then click **View or edit** from the action menu.

5. From the *[Presentation type] for [buyer/seller name]* page, click **MLS import** or **MLS Search** from the action menu.

> **Note:** The **MLS import** action menu item is displayed when you have at least one searchable module in the TOP CONNECTOR setup screen. A searchable module is searchable when you require a login screen. Otherwise, the **MLS Search** action menu item is displayed.

6. To:

- load the search results you saved in step 1 into your presentation, click **Select MLS data file**. The *Select file* pop-up window is displayed. Browse for the data file and then click **Open**.
- load any pictures you saved in step 1 into your presentation, click the **Select MLS pictures folder - if different from data** link. The *Browse for Folder* pop-up window is displayed. Browse for the file and then click **OK**.

7. Click **Next**.

   Your search results are displayed on the next page.

If no matches are found, perform the search again using new search criteria.

8. Select the properties you want to include in your presentation by selecting the appropriate check box(es).

9. To see pictures for the selected properties, click **Get pictures for selected** from the action menu.

Note: The **Get pictures** link is disabled if the pictures are automatically downloaded from your MLS board into TOP CONNECTOR 7i.

10. Click **[Save / Make] [presentation type]** from the control menu.

Note: If you are working with an HMR, you can click **Send HMR** from the control menu to send the presentation to selected contacts. For more information on sending an HMR, see *step 4 on page 443*.

11. You can now adjust the comparables. See *"Viewing or editing comparables" on page 428*.

Using a different MLS board

You can search the database of a different MLS board you have access to.

1. From the *MLS listing search - [MLS board name]* or the *Create [presentation type] - Property search - [MLS board name]* page, click **Choose another MLS board** from the action menu.

Note: If you have only set up one MLS board, the **Choose another MLS board** action menu item will NOT be available.

A list of MLS boards that you have previously set up is displayed.

2. Select the MLS database you want to search, then click **OK**.

Viewing results from a previous search

You can view the results from a previous search you have conducted.

1. From the *MLS listing search - [MLS board name]* or the *Create [presentation type] - Property search - [MLS board name]* page, click **View previous search results** from the action menu.

   The results of the previous search are displayed, regardless of whether that search was successful or not.

2. To:

   - return to the previous page and start searching for comparables, click **Previous** from the control menu at the bottom of the page. For information on downloading comparable data, see *"Downloading comparables from an MLS board" on page 422*.
   - select the comparables you want to use in your presentation, select the appropriate check box(es) and then click **Make [presentation type]** from the control menu.
     The *[Presentation type] for [contact name]* opens.

Entering comparables manually

If you do not have access to a MLS board, or you want to enter a comparable property that is not on your MLS, you can enter comparable information manually.

These instructions assume you have the *[Presentation type] for [buyer name/seller name]* page open. For instructions on getting to this page for an existing presentation, see *"Viewing and editing existing presentations" on page 435*.

To add comparables manually to an existing presentation:

1. From the *[Presentation type] for [buyer name/seller name]* page, click the **Add new** link at the bottom right of the page.

The *Comparable property for [property address]* page opens.

2. Click the **Comparable status** drop-down list and specify the comparable's type.

> **Note:** The text boxes that appear in the bottom of the page depend on which comparable type you choose.

3. In the **Features** text box, specify the comparable's features.

4. To add commentary, type in the **Comments** box.

5. Click the **Add picture** link to add a new picture. The *Select picture* pop-up window opens. Locate the picture file you want to add, then click **Open**. To remove an existing picture, click **Remove picture**.

> **Note:** Picture files must be in .JPG format.

6. Specify the comparable's address and property details in the text boxes. Text boxes worth noting include:

   - **DOM** — Days on Market (the number of days the property was for sale). Click the **DOM** link to make this field editable. If you choose this option, the "days on market" figures will NOT be automatically kept up-to-date with respect to the listing date and sold date.
   - **List price / sq. ft.** — The **List price per square foot** value is automatically calculated and displayed in this field. The value is based on the **List price** and **Square feet** text box entries.

7. The text boxes available for you to complete depend on the type of comparable you are working with. If you are working with a **Recent sale** or **Pending sale**, the following additional text boxes are available:

   - **Sale date** — Click the calendar icon to enter the date the property was sold.
   - **Sale price** — Enter the amount the property sold for (does not include adjustments).
   - **Adjustments** — Click the **Adjustments** link to manage any property adjustment amounts, (see

“Adding an adjustment to a comparable” on page 430).

- **Adjust sale price** — The **Adjusted sale price** value is automatically calculated and displayed in this field. The value is based on the **Sale price** amount plus/minus the total **Adjustments** amount.
- **Sale price / Sq. ft** — The **Sale price per square foot** value is automatically calculated and displayed in this field. The value is based on the **Sale price** and the **Square feet** text box entries (does not include adjusted amounts).
- **Adj. price / sq. ft** — The **Adjusted price per square foot** value is automatically calculated and displayed in this field. The value is based on the **Adjusted sale price** and the **Square feet** text box entries (includes any price adjustments).

8. Click **OK** to finish entering comparables, or click **Enter next** to enter another.

   For instructions on adjusting the comparables you have entered, see *“Viewing or editing comparables” on page 428*.

Viewing or editing comparables

After you have created a presentation and either downloaded or manually entered the comparables, you should preview the comparables and make any necessary alterations, including adjusting the sale price (for comparable sales) and the order of display. You may also remove comparables.

These instructions assume you have the [*Presentation type] for [contact name]* page open. For instructions on getting to this page for an existing presentation, see *“Viewing and editing existing presentations” on page 435*.

To view or edit a comparable:

1. From the *[Presentation type] for [buyer name/seller name]* page, highlight the comparable you want to view and/or edit.

2. Click the **View or edit** link at the bottom of the page.

   The *Comparable property for [contact name]* page opens.

3. To edit the comparable:

   - click the **Comparable status** drop-down list and select a type.

- add, modify, or remove the text in the **Features** box.
- add, modify, or remove text in the **Comments** box.
- click the **Add picture** link to add a new picture. The *Select picture* pop-up window opens. Locate the picture file you want to add, then click **Open**. To remove an existing picture, click the **Remove picture** link.

Note: Picture files must be in .JPG format.

- modify the address and property details, such as **House number**, **Listing date**, and **MLS number** in the appropriate text boxes.
- to delete the comparable while viewing it, click **Delete** from the action menu. When the *Delete comparable* dialog box appears, click **Yes**.

Note: If you are editing recent or pending comparable sales, you can adjust the sale price to account for specific features of the property. See *"Adding an adjustment to a comparable" on page 430*.

4. Click **OK** to return to the *[Presentation type] for [buyer name/seller name]* page.

Reordering and sorting the comparables list

You can adjust the order that the comparables are displayed in by clicking the relevant heading. For example, to sort the comparables by sale price, click the **Sale price** heading. An arrow displays the order of sorting. Click the heading again to reverse the order.

You can change the order of display of comparable columns by simply clicking on the heading and dragging it to a new position.

You may also reorder the list of comparables to ensure that selected properties appear prominently at the top of the list. To move a comparable up or down the list, highlight the comparable and click **Move up** or **Move down**, or simply drag and drop the comparable.

Filtering the comparable list

To filter the list of comparables you see:

1. From the *[Presentation type] for [buyer name/seller name]* page, click the **View by status** drop-down list.

2. Choose the type of comparables you want to see.

Choosing which field name headings are visible in the grid

1. From the *[Presentation type] for [buyer name/seller name]* page, click the **Column settings** link to select which field headings are displayed in the *Comparable properties* grid.

2. Select any number of the check boxes in the **Display** column to determine which field name headings will be visible in the **Comparable properties** grid.

3. Click **Move up** or **Move down** to rearrange the column order.

4. Click **OK**.

Deleting a comparable

To delete one or more comparables:

1. Highlight the comparable(s) in the grid.

2. Click the **Delete** link at the bottom right of the page.

   The *Delete comparable* dialog box opens.

3. Click **Yes** to confirm the deletion.

Adding an adjustment to a comparable

Some of your recent or pending comparable sales may have specific features (such as a pool, landscaped yard, etc.) that increases their value. Alternatively, the property may have characteristics that decrease its value (such as poor state of repair). You can enter a price adjustment to sale prices of your recent or pending comparable sales so that they more accurately reflect the characteristics of your listing.

To add an adjustment for a Recent or Pending sale:

1. From the *[Presentation type] for [buyer name/seller name]* page, highlight the comparable you want to add an adjustment to.

2. Click the **View or edit** link at the bottom of the page.

   The *Comparable property for [contact name]* page opens.

3. Click the **Adjustments** link next to the **Sale price** field.

   Note: This will only be available for recent or pending sales.

   The *Price adjustments for [property address]* page opens.

4. If:

   - you think you will only use the adjustment for this presentation, click **Add new** from the action menu and proceed to step 5.
   - you think you may use the adjustment in future presentations, click **Pick from common** from the action menu. This will save the adjustment feature in a list that you can later select from when you are creating other presentations. Click the **Add new** link in the bottom right to display the *Adjustment feature details* pop-up window and proceed to step 5.
   - you have already entered an adjustment feature into the common list and want to apply it to the currently displayed presentation, click **Pick from common** from the action menu. From the *Select adjustment factors* pop-up window, select the adjustment feature and then skip to step 9.

5. Type the feature you are making the adjustment for in the **Feature name** field (for example, swimming pool).

6. Type the dollar amount of the adjustment in the **Amount** field.

7. Use the **Note** box to type any notes about the adjustment.

8. If you are adding an adjustment that you will use in future presentations (i.e. you chose the second option in step 4 above), click **OK** on the *Adjustment feature details* pop-up window and proceed to step 9.

9. Select whether you want to **Add** or **Deduct** the adjustment from the comparable sale price.

   - If the comparable property has a feature that is superior to the subject property (for example, a swimming pool), select the **Deduct** option button to deduct the amount you specified in step 6 above. This will ensure that the comparable property is an accurate comparison for the subject property.
   - If the comparable property has a feature that is inferior to the subject property (for example, the comparable property is close to an airport), select the **Add** option button to add the amount you specified in step 6 above. This will ensure that the comparable property is an accurate comparison for the subject property.

10. If you are adding an adjustment that you will use in future presentations (i.e. you chose the second option in step 4 above), you can:

    - apply only one adjustment by selecting the adjustment and then proceeding to step 11.
    - apply multiple adjustments by selecting an adjustment and then clicking **Select next**. Repeat this step until you have applied all the adjustments you want.

11. Click **OK**. The adjustment will be displayed on the *Price adjustments for [property address]* page.

Viewing or editing adjustments

To modify an adjustment:

1. From the *[Presentation type] for [buyer name/seller name]* page, highlight the comparable that contains the adjustment you want to make changes to.

2. Click the **View or edit** link at the bottom of the page.

   The *Comparable property for [contact name]* page opens.

3. Click the **Adjustments** link next to the **Sale price** field.

> **Note:** This will only be available for recent or pending sales.

The *Price adjustments for [property address]* page opens.

4. To:

    - modify an adjustment for the currently displayed presentation, select the adjustment and then click **View or edit** from the action menu. Proceed to step 5.
    - modify an adjustment feature that has been added to the common list, click **Pick from common** from the action menu. From the *Select adjustment factors* pop-up window, select the adjustment and then click the **View or edit** link in the bottom right. Proceed to step 5.

5. In the **Feature name** field, modify the feature for which you are making the adjustment (for example, swimming pool).

6. Modify the dollar amount of the adjustment in the **Amount** field.

7. Use the **Note** box to edit any notes about the adjustment.

8. If you are modifying an adjustment from the common list (i.e. you chose the second option in step 4 above), click **OK** on the *Adjustment feature details* pop-up window and proceed to step 9.

9. To change whether you want the adjustment added or deducted from the comparable sale price, select the **Add** or **Deduct** option button.

    - If the comparable property has a feature that is superior to the subject property (for example, a swimming pool), select the **Deduct** option button to deduct the amount you specified in step 6 above. This will ensure that the comparable property is an accurate comparison for the subject property.
    - If the comparable property has a feature that is inferior to the subject property (for example, the

comparable property is close to an airport), select the **Add** option button to add the amount you specified in step 6 above. This will ensure that the comparable property is an accurate comparison for the subject property.

10. Click **OK** when finished.

Deleting adjustments

To remove an adjustment from a comparable:

1. From the *[Presentation type] for [buyer name/seller name]* page, highlight the comparable that contains the adjustment you want to delete.

2. Click the **View or edit** link at the bottom of the page.

   The *Comparable property for [contact name]* page opens.

3. Click the **Adjustments** link next to the **Sale price** field.

   Note: This will only be available for recent or pending sales.

   The *Price adjustments for [property address]* page opens.

4. To remove:

   - an adjustment from the currently displayed presentation, select the adjustment and then click **Delete** from the action menu. Proceed to step 5.
   - an adjustment feature that has been added to the common list, click **Pick from common** from the action menu. From the *Select adjustment factors* pop-up window, select the adjustment feature you want to delete and then click the **Delete** link in the bottom right. Proceed to step 5.

5. When the *Delete [adjustment/feature]* dialog box is displayed, click **Yes**.

6. Click **OK** when finished.

Working With Saved Presentations

Any presentation that you have created and not deleted is accessible from the *Presentations* page, where you can edit or adjust the presentation or its comparables, print it, Web publish or save the presentation as a Portable Document Format (PDF) file. You can also export CMA presentation data to Top Presenter 2.0. See *"Exporting CMA Presentation Data To Top Presenter 2.0" on page 447*.

Viewing and editing existing presentations

You can modify a CMA, Buyer presentation or Home Market Report (HMR).

A Community Report cannot be edited after it has been created. For example, you cannot change when the report was created, for whom it was created, and for what community it was created. Also, you cannot change the data gathered in this report. This is because live and actual data is collected at the time you generated this report. However, you may edit the presentation pages of your report. For more information, *"Editing presentation pages" on page 438*.

To view and/or edit an existing presentation:

1. Point to **Presentations**, then click **My presentations**.

   The *Presentations* page opens.

2. To see:

   - all of the presentations in your system, click the **All presentations** option button.
   - only CMAs, click the **CMAs** option button.
   - only buyer presentations, click the **Buyer presentations** option button.
   - only Home Market Reports (HMR), click the **Home Market Reports** option button.

   Presentations matching your filter settings appear in the grid. You'll see information about the date and time a presentation was created, its subject property address, contact name, presentation type (CMA, buyer or HMR), and whether the presentation has been published to the Web.

3. Select the presentation you want to view and/or edit, then click **View or edit** from the action menu.

   The *[Presentation type] for [buyer name/seller name]* page opens.

Note: If you selected a Buyer presentation, skip to step 5.

---

4. If you are viewing a CMA or Home Market Report (HMR), the top section of the page shows you information about the subject property. To edit the subject property's:

   - address, click the **Subject Property** link. In the *Address details* page, edit address details, then click **Close**.
   - statistics, click the **Subject property statistics** link. In the *Property statistics* page, edit the appropriate statistics, then click **Close**.
   - recommended price, click the **Recommended price** link. The *Price calculation for [property address]* page opens. To use the high (default), average, low, or low-to-high price range, select the appropriate option button. Prices are calculated based on recent sale prices of comparables.

     If you want to manually specify a price or price range, select the **Manual** option button, then select the appropriate option button below. Type the prices in the text boxes. (For example, if you want to specify a low-to-high price range, type the low price in the **Range low** text box and the high price in the **High** text box).

     Click **OK** to exit this page and return to the *[Presentation type] for [seller name]* page.

5. The bottom part of the *[CMA/HMR] for [seller name]* page, or the top part of the *Buyer presentation for [buyer name]* page, shows you the comparables used in the presentation.

   You can add, edit, and reorganize the comparables by using the links at the bottom of the page. See *"Working With Comparables" on page 422*.

6. To download comparables from the MLS board, click **MLS import** or **MLS Search** from the action menu.

Note: The **MLS import** action menu item is displayed when you have at least one searchable module in the TOP CONNECTOR setup screen. A searchable module is searchable when you require a login screen. Otherwise, the MLS Search action menu item is displayed.

For information about downloading comparables from the MLS, see *"Downloading comparables from an MLS board" on page 422*.

7. You may filter the comparables you see by setting the **View by status** drop-down list. For example, to only see current listings, select **Current listing** from the drop-down list. For more information about comparables, see *"Viewing or editing comparables" on page 428*.

8. If you want to reformat the presentation, click **View or edit presentation** from the action menu. See *"Formatting a presentation" on page 437*.

9. If you want to print the presentation, click **Print** from the action menu. See *"Printing a presentation" on page 440*.

10. If you want to delete the presentation, click **Delete** from the action menu. See *"Deleting a presentation" on page 441*.

Formatting a presentation

After you have created a presentation, you can adjust the format of the presentation before you use it. You can modify individual pages, modify the layout, rearrange the page sequence or apply a new template.

To edit or reformat a presentation:

1. From the *Presentations* page, highlight a presentation you want to reformat.

2. Click **View or edit** from the action menu.

   The *[Presentation type] for [buyer name/seller name]* page opens.

3. Click **View or edit presentation** from the action menu.

The first page of the presentation is displayed.

Editing presentation pages

1. From the *[Presentation type] for [buyer name/seller name]* page, use the drop-down list to select the page you want to edit.

2. Click **Edit page** from the action menu.

   The selected page opens in editing mode.

3. Edit the page as desired, using the word processor and the hyperlinks, then click **OK**. See *“Using the word processor” on page 306*, *“Inserting pictures, text, and marketing links” on page 314*, and *“Working With Comparables” on page 422*.

4. To add, reorganize, or apply a different template to the presentation, click **Organize pages** from the action menu on the *[Presentation type] for [buyer name/seller name]* page.

   The *Pages for [Presentation type] - [property address]* page opens.

Adding additional pages

1. To add additional pages to the presentation, click **Add from template** from the action menu.

   The *Add pages from a template* page opens.

2. Use the **Select category** and **Select template** drop-down lists to choose a category and template from which you can select a page.

3. Highlight the page or pages you want to add to the presentation, and click **OK**.

4. The pages are added at the end of the list of presentation pages. Move them to the desired location by rearranging the page order.

Rearranging the page order

1. Select the page or pages you want to move in the list.

2. Click either the **Move up** or **Move down** links, located in the bottom right corner of the page, until the page is positioned where you want it.

Deleting pages

1. To remove a page, select the page you want to remove.
2. Click **Delete** from the action menu.

   The *Delete page(s)* dialog box opens.
3. Click **Yes** to confirm the deletion.

Using a different template

1. To apply a different template to the presentation, click **Apply template** from the action menu.

   The *Apply new template for presentation* warning box opens.
2. Click **OK** to proceed.

   The *Select template* page opens.
3. Use the **Select category** drop-down list to choose a category. The names of the templates are listed in the grid. Highlight a template and click **OK**.

   The selected template's pages appear in the *Pages for [Presentation type] for - [property address]* page.
4. Click **Close** when you are satisfied with the new page arrangement.

   The *[Presentation type] for [contact name]* page reopens.

Changing the stationery

1. To change a page's stationery, use the drop-down list to select a page you want to work with.
2. Click **Customize stationery** from the action menu.

   For more information on changing the stationery for the specified presentation, see *step 3 on page 398*.

Publishing a Home Market Report

Unlike CMAs and Buyer Presentations, Home Market Reports (HMR) can be published to a site before they are sent to a customer. If you modify a published HMR, you can re-publish it to the same URL to which it was originally published. This ensures that all customers who have received a link to this report will be able to access the latest HMR. The link to the published site can also be added to the Marketing links page. This enables you to reuse this link multiple times.

To publish an HMR

1. On the Presentations menu, click **My Presentations**.

2. Locate the HMR you wish to publish.

   If the HMR has not been published, click the **Publish and create marketing** link action menu item. The HMR is published and added to the Marketing link page.

   - or -

   If the HMR presentation was previously published, click the **Publish** action menu item.

   The link in the Marketing link page is updated with the latest HMR.

3. Optionally do the following:

   - Click on the link to view the report in a separate window.
   - Select the **Marketing Link Category** under which you wish to save this link.
   - Enter a custom name for the link.

4. Click **OK**.

Printing a presentation

There are several places from which you can print the selected presentation.

To print a presentation from the Presentations page:

1. Point to **Presentations**, then click **My presentations**.

   The *Presentations* page opens. By default, all your presentations are listed.

2. Optionally select the type of presentation to display.

   Presentations matching your filter settings appear in the grid. You’ll see information about the date and time a presentation was created, its subject property address, contact name, presentation type (CMA, buyer, HMR or Community Report), and whether the presentation has been published to the Web.

3. Select the presentation you want to print, then click **Print** from the action menu.

   The *Print* pop-up window opens.

4. Set your printer options:

   - In the **Page range** section a list of pages in the presentation is displayed. Determine which pages you want to print by selecting one of the following option buttons: **All pages**, **Current page**, or **Selected pages**.
   - Specify the **Printer**, **Paper Size**, and **Paper Source** using the drop-down lists.
   - Click **OK**.

To print a selected presentation while viewing or editing it:

1. From the *Presentations* page, highlight a presentation from the list.

2. Select the presentation and then click **View or edit** from the action menu.

   - Click **Print** from the action menu on this page; or
   - Click **View or edit presentation** from the action menu to open the *[Presentation type] for [property address]* page and click **Print** from the action menu at this location.

3. Specify your **Page range** and printer options, then click **OK**.

Deleting a presentation

To delete a selected presentation:

1. Point to **Presentations**, then click **My presentations**.

   The *Presentations* page opens.

2. Select the presentation you want to delete, then click **Delete** from the action menu.

   The *Delete* dialog box opens.

3. Click **Yes**.

Publishing And Emailing A Presentation

About emailing presentations

You can email presentations by publishing the presentation to the Web as a PDF file, and then emailing the link. When the recipient clicks on the link, your presentation will open in their web browser.

You can also email HMRs as PDF attachments (see *step 4* below). However, to email a CMA, buyer presentation or Community Report as a PDF attachment, you must save it as a PDF file first, and then manually attach it to an email. For more information on saving a CMA or buyer presentation as a PDF file, see *"Saving A Presentation As A PDF File" on page 445*.

Because presentations can have a large file size, it is recommended to email your presentations as links to the Web. Some email accounts will not accept large attachments, and users may be reluctant to open attached files because of the fear of viruses.

Presentations are published to the Web as Adobe Acrobat Portable Document Format (PDF) files.

To email a presentation as a link to the Web:

1. Point to **Presentations**, then click **My presentations**.

   The *Presentations* page opens.

2. Highlight the presentation you want to email, then click **Send** from the action menu.

   It will take a few moments for the presentation to be converted to a PDF and published to the Web.
   If you're publishing a presentation that has already been published, you'll overwrite the existing PDF with the new publication.

Note: If you are creating an HMR, skip to step 5.

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3. From the *Publishing options* pop-up window, specify:

   a) the presentation's file size by choosing the **Small**, **Medium**, or **Large** option button. If you choose **Small**, the presentation will take up less space in your storage area on the Web. However, the presentation's quality diminishes when you choose a smaller file size.

b) the pages you want to publish by selecting either the **All pages** or **Selected pages** option button. If you choose the **Selected pages** option, specify the pages you want to publish by highlighting the pages in the **Selected pages** grid.

c) click **OK** and skip to step 6.

4. From the *Send Home Market Report* pop-up window, specify how you want to send the report. To:

   - send the HMR as a URL link of the .PDF format, select the **Send Home Market Report as a hyperlink with a thumbnail preview** option. Once the email has been received, clicking the link or double-clicking the thumbnail will open the .PDF version of the HMR in a separate window.
   - send the HMR as a .PDF attachment, select the **Send Home Market Report as an Adobe® .PDF attachment** option. If you choose this option, the email's size will be much larger than if you send the report as a link/thumbnail.
   - apply the setting you just specified to all HMRs you send, select the **Always use the above selection and never display this message again** check box. This setting can be changed at a later date from the *Preferences* page. For more information on setting preferences, see *"Setting General Preferences" on page 102*.
   - click **OK**.

   When the presentation has been published, the *Send [Presentation type]* page opens.

Note: In addition, the published presentation appears in the **Published materials** list, and also appears in the *Presentations* page with a status of **Yes** in the **Published status** column, see (*"Managing Published Materials" on page 70*).

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5. The **Category** and **Template** drop-down lists are automatically filled in with the presentation’s category and template information. Use the drop-down lists to choose another category and template, if you want, then click the **Use this template** link.

6. The **To** text box is automatically filled with the default email address of the presentation’s primary contact. To add additional email addresses, click the **To** link.

   The *Select contacts* page opens.

   Search for and select other contacts to email the presentation link to. Click **OK**.

   The *Send [Presentation type]* page reopens.

7. You can:

   - modify the subject line
   - add attachment files
   - add text to the body of the email
   - insert a merge code or link
   - specify whether to include a predefined signature

   For more information about how to do all these things, see *“Composing And Sending Email” on page 352*.

8. After you’ve finished creating the email, click **Next**.

   The *View or edit email for [contact name]* page opens, showing you exactly how the email will appear to the recipient(s).

9. If you’re NOT satisfied, click **Previous** and modify the email as necessary. Otherwise, click **Send**.

   The presentation is sent to the specified contact(s).

Saving A Presentation As A PDF File

You can save a presentation onto your computer as an Adobe Acrobat Portable Document Format (PDF) file. You can then save the file onto removable media (for example a floppy disk), or email the file as an attachment. For example, you could save a presentation onto a floppy disk to take to a commercial printer for printing.

Note: At any time when you are working in the Presentation manager, *Presentation details* or *Presentation editor* pages, you can click **Save as file** from the action menu.

To save a presentation as a PDF:

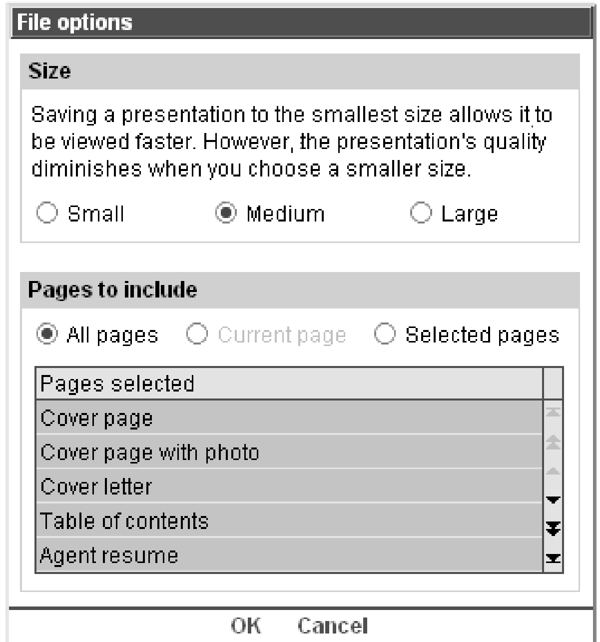
1. Point to **Presentations**, then click **My presentations**.

   The *Presentations* page opens.

2. Highlight the presentation you want to save.

3. Click **Save as file** from the action menu.

The *File options* pop-up window opens.



4. Specify:

   - the presentation's size by choosing the **Small**, **Medium** or **Large** option button. If you choose the **Small** option, the presentation will take up less space. However, the presentation's quality diminishes when you choose a smaller file size.
   - the pages you want to include by selecting either the **All pages**, **Current page**, or **Selected pages** option button.

     If you choose either **Current page** or **Selected pages**, highlight the pages you want to include in the **Pages selected** grid.

5. Click **OK**.

   The *Save as* pop-up window opens.

6. Browse to the location on your computer where you want to save the file. Type a name for the file in the **File name** text box.

7. Click **Save**.

   You will now have a copy of the presentation which can be viewed using the freely available Adobe Acrobat Reader.

Exporting CMA Presentation Data To Top Presenter 2.0

You can easily export CMA presentation data into Top Presenter 2.0, where you can create a multimedia presentation. To do this, you must have Top Presenter 2.0 installed on the same computer you are using Top Producer 7i on.

To export your CMA presentation data to Top Presenter 2.0:

1. Point to **Presentations** and click **My presentations**.
2. Select the CMA that you want to export and click **Send to TOP PRESENTER**.

   The *Select presentation style* page opens. This page allows you to select the style that will be used for the presentation in Top Presenter 2.0.

You can also export data directly from the *Presentation for [contact]* page (see *"Creating a CMA" on page 409*).

3. Select a presentation template from the **Sort by** drop-down list box, or select **All** to view all available presentation styles.
4. Select the style you want the presentation to use in Top Presenter 2.0 from the **Presentation style** list, then click **Send**.

   When the data have been sent to Top Presenter 2.0, the *Exporting CMA data is complete* message box appears.
5. Click **OK**.

   The CMA will now be available in Top Presenter 2.0.

Managing Marketing Links

In this chapter:

Working With Marketing Links

If you have marketing materials published on the Internet on your own or other web sites, you can send your contacts links to these materials.

Accessing the Marketing links library

To access the Marketing links library:

1. Point to **Mail**, then click **Communication library**.
2. Click the **Marketing links** tab. From this page, you can maintain a library of commonly used Internet links (URLs).

Creating a new marketing link

Before you can send your published marketing materials to your contacts, you must create a new marketing link.

To create a new marketing link from the Communication library:

For more information on adding, renaming, or deleting categories, see *"Working With Template Categories" on page 294*.

1. Select a category from the **List of categories** drop-down list box.
2. Click **Create new** from the action menu.

   The *New marketing link* page opens.
3. In the **Enter the URL or web site address for this link** field, type the full URL to the web site you are creating a link to. For example: "http://www.website.com/mysite.htm"
4. Complete the **Enter the new marketing text for this link** field. This will be the text people will click to view the link. For example: "*Click here to view this great property!.*"
5. Type a description in the **Enter a description for this link** field, for your own reference.
6. Click **OK**.

   The *Save template* dialog box opens.

7. Use the drop-down list box to select a category in which to save the template, then type a name for the template and click **OK**.

8. When finished creating your template, click **Close**.

Working With The Marketing Links Library

The *Marketing links* page in the Communication library enables you to create and manage a list of Internet links and web site addresses. Set up topical categories to contain related links. When you click **Live preview**, another window automatically opens connecting you to the link's URL so you can preview the site's contents. If you want, you can send a marketing link via email.

For instructions for working with template categories, see *"Working With Template Categories" on page 294*.

Viewing or editing marketing link templates

You can view, edit, copy, rename, and delete existing marketing link templates.

To view or edit a selected marketing link template:

1. From the **Marketing links** tab, select the category in which the link template you want to view or edit, belongs.

   The link templates that are part of the selected category, are listed on the page.

2. Click the **Name** heading (or the little black arrow) to sort the links in ascending or descending order.

3. Highlight the link template in the list, then click **View or edit** from the action menu.

   The *View or edit marketing link [template name] from category [category name]* page is displayed.

   The URL or web site address, marketing link text and description are displayed.

4. Make any necessary changes, then click **OK**.

Copying link templates

Copying templates is a good idea when you want to personalize a default marketing link template.

To copy a selected marketing link template:

1. From the **Marketing links** tab, select the category in which the link template you want to copy, belongs.
2. Highlight the link template in the list, then click **Copy** from the action menu.

   The *Copy marketing link [template name] from [category name] category* pop-up window opens.
3. Specify a new marketing link template name in the text box, or accept the existing name with a (**1**) appended to the name.
4. Select the category to which you want to copy the link template to, and click **OK**.

Renaming link templates

You cannot rename a marketing link in a default category. You must select a personal category before you can rename the link.

To rename a selected marketing link template:

1. From the **Marketing links** tab, select the category in which the marketing link template you want to rename, belongs.
2. Highlight the link template in the list, then click **Rename** from the action menu.

   The *Rename [template name] marketing link in [category name] category* pop-up window opens.
3. Specify a new name for the link template in the text box.
4. Click **OK**.

Deleting link templates

You cannot delete a marketing link in a default category. You must select a personal category before you can delete the link template.

To delete a selected marketing link template:

1. From the **Marketing links** tab, select the category in which the link template you want to delete, belongs.

2. Highlight the link template in the list, then click **Delete** from the action menu.

   The *Delete [template name] marketing link from [category name] category* message box opens.

3. Click **Yes** to confirm the deletion.

Sending marketing links to your contacts

You can email marketing links to your contacts, so that they may view any published marketing materials that you have posted on a web site.

1. From the *Marketing links* page, highlight a link in the list.

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

   The *Mass email* page opens.

3. For in-depth information on this feature, see *"Sending library email to contacts" on page 374*.

Live preview

This is a useful feature to ensure that your link is active, before you send it to contacts.

To view the marketing link in your Web browser:

1. From the **Marketing links** tab, select the category and highlight a link from the list.

2. Click **Live preview** from the action menu.

   A new browser window opens, displaying the marketing material.

3. Check the link(s) and content.

Working With Listings

In this chapter:

Creating And Specifying Information For A Listing

For more information about creating flyers, see *"Creating A New Flyer" on page 379*.

Once you create a listing, you can specify a variety of information about the listing, such as property features that are excluded in the sale, marketing information that should go into any flyers created for the listing, as well as associated sellers. You can also add activities, such as phone calls and appointments, that should be performed to help sell the listing.

This section is meant to help you create a listing from scratch, as well as modify the information for a listing that has already been created.

This section tells you how to:

- create a listing (see *page 455*).
- view an existing listing (see *page 457*).
- modify a listing (see *page 457*).
- assign activities to a listing (see *page 462*).
- add miscellaneous notes (see *page 466*).
- specify property features to include or exclude (see *page 467*).
- specify flyer information (see *page 468*).
- specify seller information (see *page 468*).
- apply a marketing service report (see *page 471*).

Creating a listing

Once you have a property to sell, create a listing record for the property.

You can create a listing from the *Current listings* page, which lets you view a summary of all the listings in Top Producer 7i, by clicking **Create listing** from the action menu.

To create a listing:

1. Point to **Listings**, then click **Create listing**.

   The *Create listing* page opens.

2. If you want to search for the contact that you are creating the listing for, in the **Search by** section select one of the following:

   - **Seller** — Select this option button if you want to search for the seller. In the **First name** and **Last name** text boxes, type the first and last name of the seller you want to create the listing for, then click **Next**. Skip to step 5.

- **Address** — Select this option button if you want to search by the contact's address. In the **House number** and **Street name** text boxes, type in the house number and street name of the contact you want to create the listing for, then click **Next**. Skip to step 5.

3. If you want to create a new contact for this listing, select the **Don't search, I will create a new contact record for this listing** check box.

4. Click **Next** to display the *Detailed contact entry - Add new contact* page. Enter the contact's information, then click **OK**. Skip to step 6.

Note: If the contact you just created has multiple properties, the *Create listing* page opens. Select the address you want to create the listing for and then click **Next**. Skip to step 6.

5. From the search results page, highlight the contact you want to create the listing for, then click **Next**.

Note: If no matches are found, click the **Previous** link and re-enter your search criteria.

6. To select additional sellers, highlight the contact(s) in the **Available contacts** grid and then click the **Add** arrow.

Note: You can add as many sellers as you want.

7. Click **Next**.

Note: If you are not subscribed to a team or partnership version of Top Producer 7i, skip to step 10.

8. To select listing agents, highlight the agent(s) in the **Available agents** grid and then click the **Add** arrow.

9. Click **Next**.

The **Service report** tab lets you generate a report of services that have been performed in order to sell a new listing. If you are creating a listing, it's likely that no services have been performed yet. For more information about service reports, see *"Working With Marketing Service Reports" on page 473*.

Listing plans appear on a separate page.

10. Select the listing plan you want to apply, then click **Finish**. For more information about listing plans, see *"Action, Listing And Closing Plans" on page 232*.

    The *Listing details for [seller]* page opens. The activities that belong to the listing plan you selected appear in the **Activities** tab.

11. In the top portion of the **Listing** tab, specify as much information as you can (for example, specify **List price**, **Commission**, and **MLS number**.).

    To specify terms, click the **Terms** link, and select an option from the pick list.

    To specify instructions on how to show the listing, click the **How to show** link, and select an option from the pick list.

Viewing an existing listing

This section tells you how to find a specific listing. For more information about working with the tabs in the listing record, see the rest of this section.

To view an existing listing:

1. Point to **Listings**, then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing you want to view, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

Modifying a listing

This section tells you how to modify a listing's information. You can view the listing's information, add new details, as well as modify and remove details.

1. Point to **Listings** and then click **Current listings**.

The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.

Note: If you are modifying a listing with a status of **Cancelled**, **Withdrawn**, **Closed / Paid** (when NOT linked to a closing), **Expired**, or **Closed / Paid Transferred** (when linked to a closing), certain options will NOT be available. For more information on working with frozen listings, see *“Changing a listing’s status” on page 461*.

   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information on specifying a date range, see *“Specifying Date Ranges” on page 26*.

3. Select the listing you want to view, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. To modify any addresses associated with the listing:

   - click the listing’s address in the top left of the page.

     The *Select address* page opens.

   - select the address you want to modify and then click **View or edit address** from the action menu.

     The *Primary property details for [contact]* page opens.

   - modify the address information by typing in the appropriate fields, or using the drop-down lists and list icons.

Note: The **Direction prefix** drop-down list lets you select whether a direction appears before a street name, such as W 29th. If the direction appears after the street name, such as 29 W, use the **Direction suffix** drop-down list instead.

   - add property notes in the **Property notes** tab. For more information on working with notes, see

"Managing notes from the contact record" on page 139.

- add tenant information by clicking **Add tenant information** from the action menu. Click **OK** to return to the *Listing details for [contact]* page. For more information on entering tenant information, see *"Adding tenant information for a property" on page 155*.
- click **Close** to return to the *Select address* page.
- click **OK** to return to the *Listing details for [contact]* page.

5. To modify the:

- **Listing date** — Type the date the listing takes effect (if it is other than today's date), or click the calendar icon to select a date.
- **Expires** — Type the date the listing expires, or click the calendar icon to select the listing's expiry date. When the specified expiry date arrives, the listing's status will automatically change to **Expired** and the listing activity reminders will stop being displayed in Today's business. For more information on working with Today's business, see *"Working With Today's Business" on page 256*.
- **Expiration reminder** — Type the listing's expiry reminder date, or click the calendar icon to select the listing's expiry reminder date. If you set up the **General preferences** option to display listing expiration reminders upon login, the *Listing expiration reminder* page will be displayed to remind you of this expiration date in advance. For more information on setting preferences, see *"Setting General Preferences" on page 102*.
- **Listing term (days)** — Type the number of days the property has been listed. The number automatically reflects the difference between the **Listing date** and the **Listing expiry date**.
- **List price** — Type the list price of the property.
- **Commission** — Type the commission amount you stand to make on the sale of the property in the **Commission** text box.
- **Source** — Click the list icon to select a preset item. Use the item that best describes the source of the listing, such as **Ad**, **Referral**, **Sphere of Influence**, **Past client**, **For Sale by Owner** (F.S.B.O.), **Expired listing**.
- **House style** — To change the house style of the listing property, type a descriptor in the text field,

or click the adjacent list icon to select a preset item.

- **Sign placed** — The **Sign placed** check box should only be selected when the “for sale” sign has actually been placed on the property. Click the check box to indicate that the “for sale” sign has been placed.
- **Lock box number** — Enter the number of the lock box if one has been installed on the property.
- **MLS number** — Type the listing’s MLS number in the **MLS number** text box field if you are uploading this listing to a web site.
- **Terms** — The **Terms** text box is used to record financial requirements that are particular to the contact. For example, a seller might require that potential buyers have pre-approved financing. Enter any specific terms, or click the **Terms** link to select a common transaction term from the pick list.
- **How to show** — This field is used to record the methods you may use to show the contact’s property. For example, the seller might stipulate that all showings are “By appointment only” or that they “Require 24 hours notice”. Enter the showing methods/restrictions, or click the **How to show** field link to select an item from the pick list of common showing arrangements.
- **Property type** — Enter the type of property (i.e. **Commercial/Industrial land**; **New single family**); or click the list icon to select a preset item.
- **Status** — Use the drop-down list box to select the status of the listing. If you change the status to anything other than **Active** or **Pending showing**, and there are activities that you have not yet completed, the *Stop reminders* dialog box will be displayed. Clicking **Yes** will remove the activity reminders from Today’s business.

6. To add or edit a closing activity or a listing plan, click the **Activities** tab. For more information on listing activities, see *“Assigning activities to a listing” on page 462*.

7. Enter notes related to the listing under the **Notes** tab. For more information on working with notes, see *“Managing notes from the contact record” on page 139*.

8. Click the **Include/Exclude** tab to create and maintain two lists that detail which property features do and do not come with the property after the sale. For more information, see *"Assigning activities to a listing" on page 462*.

9. The **Flyer information** tab lets you enter short descriptions to be used when creating flyers for the selected listing. For more information, see *"Specifying flyer information" on page 468*.

10. To view the sellers associated with the listing, click the **Sellers** tab. For more information, see *"Specifying seller information" on page 468*.

11. If you are part of a team account, click the **Agent(s)** tab to view agents associated with the displayed listing. For more information, see *"Managing listing agents" on page 470*.

12. To apply automatic marketing report plans, view, edit, or delete service reports, click the **Scheduled reports** tab. For more information, see *"Applying marketing service report plans" on page 471*.

Changing a listing's status

When a listing's status changes to **Cancelled**, **Withdrawn**, **Closed/Paid** (when NOT linked to a closing), **Expired**, or **Closed/Paid Transferred** (when linked to a closing), the listing will become "frozen", thereby disabling some of the action menu items and locking certain listing details.

The following action menu items are disabled for the listing record:

- **Create closing**
- **View or add property photos**
- **Import from MLS**
- **Create flyer**
- **Upload listing to web sites**
- **Update listing on web sites**

On the *Listing details for [contact name]* page, the following are locked:

- **Listing address** hyperlink
- **Source** field
- **House style** field
- **Activities** tab (**Add**, **View or edit**, **Delete**, or **Select plan** hyperlinks)
- **Sellers** tab (**Remove** and **Add from address book** hyperlinks)

> **Note:** For frozen records, you can still edit the contact's record and the data will be saved in the Address book. However, the snapshot information will NOT be updated on the *Listing details for [contact name]* page.

Assigning activities to a listing

If you selected a listing plan when you first created the listing, (see step 4 of *"To create a listing:" on page 455*) the activities that belong to the listing plan you selected appear in the **Activities** tab.

You can:

- add an activity (see *page 462*).
- mark an activity done (see *page 464*).
- view or edit an activity (see *page 464*).
- delete an activity (see *page 465*).
- apply and unapply a listing plan (see *page 466*).
- specify whether you want the listing's activities to appear in Today's business (see *page 466*).

For more information about listing plans, see *"Action, Listing And Closing Plans" on page 232*.

To add a new activity:

1. In the **Activities** tab, click **Add**.

   The *Add new activity* page opens.

2. Specify what type of activity you want to create by selecting the appropriate option button, then click **Next**.

   The *Add a listing [activity type]* page opens.

3. In the **Activity details** section, specify the particulars of the activity, including a brief description about the activity and who the activity is assigned to. The **Contacts** field will automatically display the name(s) of the seller.

> **Note:** Depending on the activity-type you are creating, the fields in this section will vary.

4. In the **Activity dates** section, specify whether the activity date should be fixed or auto-adjusted:

   - to make the activity due on its specified date regardless of whether there is a change in either the listing or expiry date, select the **Fixed date** option button.

- to automatically reschedule the activity due date if the listing date changes, select the **If the listing date changes auto-adjust** option button. If the listing date changes, then the activity will be rescheduled to occur the same number of days earlier or later (for example, if the listing date is moved one week later, then the activity date will be moved one week later as well).
- to automatically reschedule the listing activity due date if the listing expiry date changes, select the **If the expiry date changes auto-adjust** option button. If the expiry date changes, then the activity will be rescheduled to occur the same number of days earlier or later (for example, if the expiry date is moved one week later, then the activity date will be moved one week later as well).

For more information about working with Today's business, see *"Working With Today's Business" on page 256*.

5. In the **Reminder and Drop off** section, specify whether you want to be reminded of the activity or remove the activity from Today's business after a certain amount of time:

- if you want to be reminded (from Today's business) a certain number of days before the activity is scheduled to occur, set the **Remind me** field. Either type the number of days in the text box or use the spin buttons.
- if the system detects a Palm device, you can set an alarm on your Palm device. Check the box to set an alarm on your Palm device. Use the spin buttons to set the you want to be notified, before the appointment. The system must be synchronized with the Palm device before the alarm is displayed.

Note: When the **Remind me** field is set to zero, you will be reminded (from Today's business) to perform the activity on the same day it is scheduled to occur.

Setting a drop off value is particularly useful if you suspect that the activity may NOT be completed on the scheduled date.

- if you want the activity to be removed from Today's business after a certain number of days, select the **Apply drop-off to Today's business** check box. Type a value directly in the second field or use the spin buttons. (If you set the **Drop off** value to **5**, you will be reminded in Today's business to perform the activity for 5 days after the activity's scheduled date.)

Note: When the **Apply drop-off to Today's business** check box is cleared, the activity will remain in Today's business until you mark it done.

6. Click **Finish**.

   The *Listing details for [seller]* page reopens.

To mark an activity done:

1. In the **Activities** tab, select the activity you want to mark done, then click **Mark done**.

   The *Mark done* dialog box opens.

2. Click **Yes**.

   The *Add activity to service report* dialog box opens.

3. Click **Yes** to add the activity to the service report.

   The *Add activity for [Listing address]* pop-up window opens.

4. Specify:

   - the activity's description by typing in the **Description** field, or click the list icon to select a preset item.
   - the activity's date by typing in the **Date** field, or clicking the calendar icon.
   - the time of the activity by typing in the **Time** field, or by using the spin buttons.
   - the total cost it took to perform the activity by typing a value in the **Cost** field.
   - any details for the activity by typing in the **Details** section, or click the **Details** link to select a preset item.

5. Click **OK**.

To view or edit an activity:

1. In the **Activities** tab, select the activity you want to view or edit, then click **View or edit**.

   The *View or edit [activity type] for [seller]* page opens.

For more information about the fields in this page, see steps 3 to 5 of *"To add a new activity:" on page 462*.

The fields in this page are the same ones you saw when you created the activity, except for a few additional fields in the **Activity dates** section. Depending on the type of activity you are viewing or editing, these additional fields will vary.

2. If you want to edit whether the activity date should be fixed or auto-adjusted, proceed to step 3.

   If you are finished viewing or editing the activity, skip to step 4.

3. In the **Activity dates** section, edit whether the activity date should be fixed or auto-adjusted:

   - to make the activity due on its specified date regardless of whether there is a change in either the listing or expiry date, select the **Fixed date** option button.
   - to automatically reschedule the activity due date if the listing, expiry, closing or acceptance date changes, select the **If the listing / expiry / closing / acceptance date changes auto-adjust** option button. If the listing, expiry, closing or acceptance date changes, then the activity will be rescheduled to occur the same number of days earlier or later (for example, if the listing date is moved one week later, then the activity date will be moved one week later as well).
   - if the activity is related to another activity, select the **If preceding activity changes auto-adjust** option button, then select the preceding activity from the drop-down list.

Note: You can NOT clear or change the preceding activity in the drop-down list. To do this, select the **Fixed date** option button.

4. When you're finished viewing or editing the activity, click **OK**.

   The *Listing details for [seller]* page reopens.

To delete an activity:

1. In the **Activities** tab, select the activity you want to delete, then click **Delete**.

   The *Delete activity* dialog box opens.

2. Click **Yes**.

To apply and unapply a listing plan:

1. In the **Activities** tab, click **Select plan**.

   The *Select listing plan* pop up window opens. The *Select listing plan* pop up window shows you all the available listing plans and the plans that have been applied to the listing.

2. To:

   - apply a plan, from the **Available plans** column, select the plan you want to apply, then click **Add**.
   - unapply a plan, from the **Current plans** column, select the plan you want to unapply, then click **Remove**.

3. Click **OK**.

To specify whether you want the listing's activities to appear in Today's business:

1. You can specify whether you want the listing's activities to appear in Today's business by selecting or clearing the **Stop reminders** check box in the **Activities** tab.

2. To make the listing's activities:

   - NOT appear in Today's business, select the check box.
   - appear in Today's business, clear the check box.

Adding miscellaneous notes

You may want to add miscellaneous notes about the listing or about the seller. You can do this after you create a listing, in the **Notes** tab of the listing record. For more information about creating a listing, see *"Creating a listing" on page 455*.

This section tells you how to:

- write your own note
- pick from a list of existing notes
- edit an existing note
- print a listing's notes

To work with a listing's notes:

1. In the **Notes** tab, click **Add new**.

2. To write your own note, click **Add new** and begin typing your note.

For more information about pick lists, including how to add an item to a pick list, see *"List Icons" on page 23*.

3. To pick from a list of existing notes already in your system, click **Pick from list**.

   The *Listing notes* pop up window opens.

4. Select a note, then click **OK**.

5. To edit an existing note, click where in the note you want to make the edit and begin typing your change.

6. To print the notes, click **Print notes**.

   The Top Producer 7i *Report -- Print Notes* page opens.

7. Click the **Print** icon at the top of the page.

   The *Print* pop up window opens.

8. Specify print options and then click **Print**.

9. To view the next 10 notes (if there are a lot of notes added to the listing) click **View 10 more**.

10. To show ALL the listing's notes, click **View all**.

Specifying property features to include or exclude in a sale

You can specify what features of a property will be included or excluded after a sale. For example, if an owner does NOT want to include their above ground pool in the sale of their home, this would be a property-feature to put in the exclusion list.

You can do this after you create a listing, in the **Include / Exclude** tab of the listing record. For more information about creating a listing, see *"Creating a listing" on page 455*.

To specify property features to include or exclude in a sale:

1. You can add property features in the **Include / Exclude** tab by either:

   - picking from a list of existing items
   - typing the feature directly into Top Producer 7i

For more information about pick lists, including how to add an item to a pick list, see *"List Icons" on page 23*.

2. To pick from a list of existing items, click either **Include** or **Exclude**.

   The *Include/Exclude* pop up window opens.

3. Select the item to include or exclude, then click **OK**.

4. The item you selected appears in either the **Include** or **Exclude** column, depending on whether you specified a feature to include or exclude in the sale.

5. To type the feature directly into Top Producer 7i, click the (To add new item, click here) phrase, which appears in red.

   Your cursor appears, which lets you know you can type the feature you want to include or exclude.

6. If you'd like to type another feature, press the **[Enter]** key to create a new line, then start typing.

7. To edit an existing feature, click the feature, then type the edit.

8. To delete an existing feature, click the feature, then press the **[Delete]** key.

Specifying flyer information

You can specify information about a listing that will automatically appear if the corresponding merge code is used when the flyer is created. For more information about creating flyers, see *"Creating A New Flyer" on page 379*.

You can do this after you create a listing, in the **Flyers** tab of the listing record. For more information about creating a listing, see *"Creating a listing" on page 455*.

To specify flyer information:

1. In the **Description** column, type a formal description of the property. For example, "This is a four-bedroom rancher with an ocean view that is only five minutes away from schools and shopping." Whatever you type in this column will automatically appear when the **FLYER_DESCRIPTION** merge code is used in the flyer.

2. In the **Flyer text** column, type information about the home that has a marketing slant. (For example, "Grab this one before it's gone! Beach front property at this price is a rare opportunity!) Whatever you type in this column will automatically appear when the **FLYER_TEXT** merge code is used in the flyer.

Specifying seller information

If any sellers are associated with the listing, you can add them to the listing record. To add a seller to the listing, however, the seller must have a contact record in Top Producer 7i. For more information about working with contacts, see *"Managing Contacts" on page 121*.

You can also:

- remove a seller
- view a seller's contact record
- send an email to a seller
- send a letter, envelope, label or postcard to the seller

You can do this after you create a listing, in the **Sellers** tab of the listing record. For more information about creating a listing, see *"Creating a listing" on page 455*.

To specify seller information:

1. To add a seller, click **Add from address book**.

   Note: To add a seller, the seller must have a contact record in Top Producer 7i. If you want to add a seller who does NOT have a contact record, you must first create a contact record. For more information about creating a contact record, see *"Creating a contact record" on page 124*.

   The *Select contacts* page opens.

2. To search for a specific contact, select the appropriate option button for the type of search criteria you'd like to use, then specify the corresponding information in the fields below. For example, if you select **Name**, specify a first or last name, or a company name. (You may use incomplete search criteria, such as "Smi" or "Smith".)

To clear your search criteria, click **Clear search.**

3. Click **Start search**.

   The contacts matching your search criteria appear in the left column.

To remove any contacts you may have selected, select the contacts from the right column, then click **Remove.**

4. Select the contact(s) you want to designate as sellers who are associated with the listing, then click **Add**.

   The selected contacts move to the right column.

5. Click **OK**.

   The **Sellers** tab reappears.

6. To remove a seller from the listing, select the seller, then click **Remove**.

   The *Remove seller* dialog box opens.

7. Click **Yes**.

   The seller is removed.

8. To view the contact record for a seller, select the seller, then click **View contact**.

   The *Contact details for [seller]* page opens. You can modify the seller's contact record, if necessary. For more information, see *"Modifying a contact record" on page 133*.

9. To send an email to a seller, select the seller, then click **Send email**.

   The *Mass email* page opens. For more information about sending a mass email, see *"Sending Mass Email" on page 356*.

Note: If there is no email address specified in the contact's record, you will NOT be able to click **Send email**. For more information about contact records, *see* *"Managing Contacts" on page 121*.

10. To send a letter, envelope, label or postcard to a seller, select the seller, then click **Perform mail out**.

    The *Perform mail out — select template* page opens. For more information about sending a letter, envelope, label or postcard from this page, see *"Performing A Mail Out" on page 337*.

Managing listing agents

If you are part of a team account, click the **Agent(s)** tab to display agents associated with the displayed listing.

1. From the main menu, point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. Select a listing and then click **View or edit listing** from the action menu.

   The *Listing details for [contact name]* page opens.

3. Click the **Agent(s)** tab.

   All agents involved with the displayed listing are displayed.

4. To add an agent:

    - Click the **Add or Remove** link.
      The *Agent(s)* page opens.
    - Select the agent you want to add from the **Available agents** grid, and then click the **Add** arrow.
      The agent's name appears in the **Selected agents** grid.
    - Click **OK** from the control menu to return to the *Listing details for [contact name]* page.

5. To remove an agent:

    - Click the **Add or Remove** link.
      The *Agent(s)* page opens.
    - Select the agent you want to remove from the **Selected agents** grid, and then click the **Remove** arrow.
      The agent's name moves to the **Available agents** grid.
    - Click **OK** from the control menu to return to the *Listing details for [contact name]* page.

Applying marketing service report plans

For each listing, you can apply and remove marketing service report plans. You can also view all marketing service reports that have already been generated for a listing, in addition to reports that are scheduled to be generated in the future. For more information about working with marketing service reports, see *"Working With Marketing Service Reports" on page 473*.

This section tells you how to:

- apply and remove a report plan
- view a report
- modify a report
- delete a report

You can do this after you create a listing, in the **Scheduled reports** tab of the listing record. For more information about creating a listing, see *"Creating a listing" on page 455*.

To apply marketing service reports:

1. To apply or remove a report, click **Automatic reports**.

   The *Marketing report plans* page opens.

2. Select the plan you would like to:

    - apply, then click **Apply** from the action menu.

- remove, then click **Remove applied** from the action menu.

Note: If you can NOT see **Apply** in the action menu, then the plan you have selected is already applied.

If you can NOT see **Remove applied** in the the action menu, then the plan is NOT applied.

For more information about the other tasks you can perform in this page, such as renaming or deleting a marketing report plan, see *"Managing a marketing service report's automatic reports" on page 479*.

3. To view a report, select the report you would like to view, then click **View report**.

   The *Marketing service report* page opens. For more information about how to fill each field, see *"Creating a marketing service report" on page 473*.

4. To modify a report, select the report you would like to modify, then click **Modify report**.

   The *Modify scheduled report* page opens. For more information about how to fill each field, see *"To add a new report:" on page 482*.

5. To delete a report, select the report you would like to delete, then click **Delete**.

   The *Delete scheduled report* dialog box opens.

6. Click **Yes**.

   The report is deleted.

Working With Marketing Service Reports

The marketing service report feature lets you generate a report of services that have been performed in order to sell a new listing.

You can:

- create a marketing service report (see *page 473*).
- add activities to a marketing service report (see *page 477*).
- manage a marketing service report's activities (see *page 478*).
- manage a marketing service report's automatic reports (see *page 479*).
- manage the plans for a marketing service report's automatic reports (see *page 481*).

Creating a marketing service report

This section tells you how to create a marketing service report, that can later be printed or published for viewing on the web.

To create a new marketing service report:

1. Point to **Listings**, then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26*.

3. Select the listing you want to create a marketing service report for, and then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

An alternative way to access the *Marketing service report* page is by clicking the **View report** action menu item from the *Current listings* page or from the **Listing** tab on the *Listing details for [seller]* page. When the *Report options* page opens, select the **Marketing service report** option button, and then click **Create service report** from the control menu.

4. Click the **Service report** tab.

5. Click **Report** from the action menu.

   The *Marketing service report* page opens.

6. Select the seller you want to create the report for by selecting an option from the **Create for** drop-down list.

7. In the **Introductory comments** and **Summary remarks** sections, you can:

   - spell check the comments by clicking the **Spell check** link.
   - add a new comment by clicking either the **Introductory comments** and **Summary remarks** links.
     The *Insert comments/remarks* page opens.
     Specify whether you want to add an introductory or summary remark by selecting the appropriate option button.
     Click **Add new** from the action menu.
     The *Add comment* pop-up window opens.
     Enter a description and comments in the appropriate sections, and then click **OK**.
     The comment is saved for future use.
     Click **OK** to return to the *Marketing service report* page.
   - set a comment as default by clicking either the **Introductory comments** and **Summary remarks** links.
     The *Insert comments/remarks* page opens.
     Select the comment you want to set as default from the **Comment description** section.
     Click **Set as default** from the action menu.
     The word **(Default)** appears beside the comment.
     Each time a service report is created, the default comment will be applied. However, you can change the default comment at any time.
     Click **OK** to return to the *Marketing service report* page.
   - remove a comment by clicking either the **Introductory comments** and **Summary remarks** links.
     The *Insert comments/remarks* page opens.
     Select the comment from the **Comment description** section, and then click **Delete** from the action menu. The *Delete comment* dialog box opens.
     You can <u>NOT</u> delete a comment that is set as default.

Click **OK** to return to the *Marketing service report* page.

8. In the **Report options** section:

    - select the **Include property picture** check box to include the property picture in the report.
    - select the **Include market data** check box if you want to include marketing data in the report.
    - select the **Include cash expenses** check box if you want to include expenses in the report.
    - specify marketing data options by clicking the **Set up market data** link.
      The *Service report — market data* page opens.
    - specify advanced report options by clicking the **Advanced report options** link.
      The *Report options* page opens.

      In the **Include/exclude** tab specify the information you want to include in the report by selecting the appropriate check box(es).
      To save these settings for future use, click the **Remember options** link. The *Set as default* dialog box opens. Click **OK** to set the specified report options as default. These options will be used when future listing service reports are created. However, you can modify these options at any time.
      Click the **Load default options** link to use default options you have specified in the past. When the *Restore defaults* dialog box opens, click **Yes**.

      Click the **Report text** tab to specify the report's heading and body information. Type the heading and body information in the appropriate boxes.
      To save these settings for future use, click the **Remember options** link. The *Set as default* dialog box opens. Click **OK** to set the specified report text as default. This text will be used when future listing service reports are created. However, you can modify this text at any time.
      Click the **Load default options** link to use the default text you have specified and saved in the past. When the *Restore defaults* dialog box opens, click **Yes**.

      Click the **Colors** tab to specify the report's background and font colors. Specify the report's background and font colors by clicking a color in the appropriate section. A preview of how the report will look with the specified colors is displayed on the right.

To save these settings for future use, click the **Remember options** link. The *Set as default* dialog box opens. Click **OK** to set the specified settings as default. These settings will be used when future listing service reports are created. However, you can modify these settings at any time. Click the **Load default options** link to use the default color settings you have specified in the past. When the *Restore defaults* dialog box opens, click **Yes**.

- Click **OK** to return to the *Marketing service report* page.

9. In the **Service activities** section:

   - specify the date range of the activities you want to include on the report by entering a date in the **from** and **to** text boxes, or by clicking the calendar icons.
   - add a showing by clicking **Add showing** in the bottom right corner of the page. Enter the showing's information, and then click **OK**.
     Note: Click **Select from Database**. Click **Add a new contact**. Make sure the Always check for duplicate contacts check box in general preferences is selected, if you want to do a duplicate check, see *"Checking for duplicate contacts" on page 122*
   - add an activity to the report by clicking **Add activity** from the bottom right corner of the page. Enter the activity's details, and then click **OK**.
     For more information on entering an activity, see *page 477*.
   - modify an activity by clicking **Change activity** from the bottom left corner of the page. Modify the activity's details, and then click **OK**.
     For more information on modifying an activity's details, see *page 477.*
   - remove an activity from the report by selecting the activity and then clicking **Delete activity** from the bottom left corner of the page. When the *Delete* dialog box opens, click **Yes**.

10. Once you've finished specifying the report information, click **Save and print later** from the control menu.

The *Print later* pop-up window opens.

11. Specify:

    - the report's name in the **Report name** field.
    - the date you want to send the report by typing a in the **Date** field, or by clicking the calendar icon.
    - who to assign the report to by selecting an option from the **Assigned to** drop-down list.

12. Click **OK**.

    The report will be displayed in Today's business on the date you specified. For more information about working with service reports from Today's business, see *"Working With Service Reports From Today's Business" on page 286.*

Adding activities to a marketing service report

This section tells you how to add activities to a marketing service report.

1. From the main menu, highlight **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing you want to create a service report for, and then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click the **Service report** tab.

5. To add an activity to the service report:

   - click **Add activity** from the action menu. The *Add activity for [Listing address]* pop-up window opens.

- enter the activity's description by typing in the **Description** field, or click the list icon to select a preset item.
- enter the activity's date by typing in the **Date** field, or clicking the calendar icon.
- enter the time of the activity by typing in the **Time** field, or by using the spin buttons.
- enter the total cost it took to perform the activity by typing a value in the **Cost** field.
- enter any details for the activity by typing in the **Details** section, or click the **Details** link to select a preset item.
- click **OK**.

6. Repeat step 5 for each activity that you need to add to the service report.

7. Click **Close** to return to the *Current listings* page.

Managing a marketing service report's activities

This section tells you how to add, modify and delete a marketing service report's activities.

To manage a marketing service report's activities:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26*.

3. Select the listing you want to create a service report for, and then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click the **Service report** tab.

5. To:

   - add an activity to the report, click **Add activity** from the action menu. Enter the activity's details, and then click **OK**.

For more information on entering an activity, see *"Adding activities to a marketing service report" on page 477*.

- modify an activity, click **Change activity** from the action menu. Modify the activity's details, and then click **OK**.
  For more information on modifying an activity's details, see *"Adding activities to a marketing service report" on page 477.*
- remove an activity from the report, select the activity and then click **Delete activity** from the action menu. When the *Delete* dialog box opens, click **Yes**.

6. Click **Close** to return to the *Current listings* page.

Managing a marketing service report's automatic reports

You can apply an automatic report to a marketing service report plan. Only one automatic report can be applied at a time.

This section tells you how to:

- apply a plan (*see page 480*).
- remove a plan (*see page 480*).
- view and edit a plan (*see page 480*).
- create a new plan (*see page 480*).
- copy a plan (*see page 481*).
- rename a plan (*see page 481*).
- delete a plan (*see page 481*).

To manage a service report's automatic report plans:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing you want to create a service report for, and then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click the **Service reports** tab.

5. Click the **Automatic reports** action menu item.

   The *Marketing report plans* page opens.

To apply a plan:

You can only apply one plan to a listing or closing at a time. This means that if you have plan A applied, but want to apply plan B, you must remove plan A.

1. Select the plan you want to apply, then click the **Apply** action menu item.

   Yes appears in the **Applied** column.

To remove a plan:

1. Select the plan you want to remove, then click **Remove applied** from the action menu.

   No appears in the **Applied** column.

To view or edit a plan:

1. Select the plan you want to view or edit, then click **View or edit** from the action menu.

   The *View or edit report plan [report name]* page opens.

   From here you can manage the plan's scheduled reports, including adding a new report and modifying an existing report. For more information, see *"Managing the plans for a marketing service report's automatic reports" on page 481.*

To create a new plan:

1. Click **Create new** from the action menu.

   The *Create new report plan* pop up window opens.

2. In the **Report plan name** field, type a new name.

3. Click **OK**.

   The *View or edit report plan [report name]* page opens.

4. From here you can manage the plan's scheduled reports, including adding a new report and modifying an existing report.

   For more information, see *"Managing the plans for a marketing service report's automatic reports" on page 481*.

To copy a plan:

1. Select the plan you want to copy, then click **Copy** from the action menu.

   The *Copy report plan* pop up window opens.

2. In the **Report plan name** field, type a new name (if necessary).

3. Click **OK**.

   The *View or edit report plan [report name]* page opens. From here you can manage the plan's scheduled reports, including adding a new report and modifying an existing report.

   For more information, see *"Managing the plans for a marketing service report's automatic reports" on page 481*.

To rename a plan:

1. Select the plan you want to rename, then click **Rename** from the action menu.

   The *Rename report plan* pop up window opens.

2. In the **Report name plan** field, type a new name.

3. Click **OK**.

   The plan is renamed.

To delete a plan:

1. Select the plan you want to delete, then click **Delete** from the action menu.

   The *Delete report plan* pop up window opens.

2. Click **Yes**.

   The plan is deleted.

Managing the plans for a marketing service report's automatic reports

You can work with the plans within an automatic report plan. This section tells you how to:

- add a new report to a plan (*see page 482*).
- rearrange reports in a plan (*see page 483*).
- modify an existing report (*see page 483*).
- delete an existing report (*see page 484*).

To manage plans for a marketing service report's automatic reports:

1. From the main menu, highlight **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, refer to *"Specifying Date Ranges" on page 26.*

3. Select the listing you want to create a service report for, and then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click the **Service reports** tab.

5. Click **Automatic reports** from the action menu.

   The *Marketing report plans* page opens.

6. Select the plan you want to view or edit, then click the **View or edit** from the action menu.

   The *View or edit report plan [report name]* page opens.

To add a new report:

1. Click **Add new** from the action menu.

   The *Add new plan item* page opens.

2. In the **Report name** field, type a name for the new report.

3. From the **Assigned to** drop-down list, specify a person to assign the report to.

4. Schedule how many days, weeks or months after the previous report the new report should run. Either type a number value in the **Schedule this report** field or use the spin buttons, then, from the adjacent drop-down list, select **Day(s)**, **Week(s)** or **Month(s)**.

5. Specify whether to include all activities that occurred since the previous report or since the start of the plan by selecting the appropriate option button.

To add new comments, click **Add new** from the action menu. The *Add comment* dialog box opens. Type a description, then the comments, and then click **OK**.

To set a default comment, select the comment, then click **Set as default** from the action menu.

To delete a comment, select the comment, then click **Delete**.

6. To include introductory comments or summary remarks, either type the comments in the **Introductory** or **Summary** area, or click **Introductory comments** or **Summary remarks** to insert existing text.

   If you have selected to insert existing text, the *Insert comments/remarks* page opens.

   Select whether you want to select introductory or summary text by selecting the appropriate option button, then, in the **Comments description** area, select the text you want. Click **OK**.

   The *Add new plan item* page reopens.

7. To spell check:

   - introductory comments, click **Spell check** (top right of the **Introductory comments** area).
   - summary remarks, click **Spell check** (top right of the **Summary remarks** area).

8. Click **OK**.

   The *View or edit report plan [report name]* page reopens with the new report.

To rearrange the order of reports:

- Select the report you want to move, then click **Move up** or **Move down** as many times as necessary.

To modify an existing report:

1. Select the report you want to modify, then click **View or edit** from the action menu.

   The *View or edit service report plan item* page opens. For more information about the fields in this page, see *“To add a new report:” on page 482.*

To delete a report:

1. Select the report you want to delete, then click **Delete** from the action menu.

   The *Delete report* dialog box opens.

2. Click **Yes**.

   The report is deleted.

Viewing Or Editing Property Statistics

If you want to view detailed information about a property, such as the dimensions of individual rooms, zoning, and when the property was last sold, then view the listing's property statistics.

Property statistics can also be specified and modified from the seller's contact record. For more information, see *"Modifying a contact record" on page 133*.

To view or edit property statistics:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing whose property statistics you want to view or edit, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click **View property statistics** from the action menu.

   The *Contact details for [seller]* page opens.

5. Modify the fields as necessary, then click **Close**.

Viewing, Adding Or Deleting Property Photos

You can add property photos to a listing, as well as remove property photos.

You can also associate a photo with a merge code so that when the associated merge code is used in correspondence, such as a letter, the photo will automatically appear. For example, if you have added a picture of a property's garden, associate the picture with the **view_garden** merge code to make that picture appear every time the **view_garden** merge code is used in correspondence.

Property photos can also be added and removed from the seller's contact record. For more information, see *"Adding Pictures To A Contact Record" on page 143*.

For more information about working with correspondence, see *"Using The Communication Library" on page 293*.

To view, add or delete property photos:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing whose photos you want to work with, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click **View or add property photos** from the action menu.

   The *Contact details for [seller]* page opens.

5. To see any pictures that have already been added or about to be added, select the **Display picture** check box. When this check box is cleared, you will NOT be able to see any pictures.

6. To view all pictures associated with the listing:

   - use the **Picture** drop-down list to select the picture type (a property photo or map).
   - specify the associated merge code by selecting an option from the **Merge code** drop-down list.
   - scroll through all pictures associated with the displayed listing by using the **<<Previous** and **Next>>** links.

7. To add a picture:

   - use the **Picture** drop-down list to select the type of picture you want to add (a property photo or map).
   - click **Add** to add a new picture from your computer. The *Select picture* pop up window opens.
   - browse your computer and select the file to add. Click **Open**. The picture is displayed.
   - specify the merge code to associate with the picture by selecting an option from the **Merge code** drop-down list.

Note: Pictures must be in Joint Photographic Experts Group (.JPG or JPEG) format.

8. To remove a picture:

   - use the **Picture** drop-down list to select the picture type (a property photo or map).
   - specify the associated merge code by selecting an option from the **Merge code** drop-down list.
   - select which picture you want to remove by using the **<<Previous** and **Next>>** links.
   - click **Remove**. The *Remove picture* dialog box opens.
   - click **Yes**.

Note: Removing a picture from a record does NOT remove the picture from your computer.

9. Click **Close**.

Importing Property Information From An MLS Board

If a listing exists in an MLS board, you can import the property information that appears in the MLS board into Top Producer 7i. However, you can only import MLS board information if your subscription to Top Producer 7i includes a Top Connector 7i license.

Note: Before you can import a listing's property information, you must set up your MLS board. For more information, see *"Setting Up Top Connector 7i" on page 80*.

To import comparables from an MLS board:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing you'd like to import information for, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click **Import from MLS** from the action menu.

   The *MLS listing search — [MLS board name]* page opens.

The MLS listing search — [MLS board] page has online Help topics for each field, such as **MLS number**. Just click a field to see some help in the white box at the top of the page.

If there were no matching properties, try specifying your search criteria again. You could also try specifying different search criteria. The quickest way to find a property is by MLS number.

5. If you'd like to select another MLS board, click **Choose another MLS board** from the action menu. Otherwise, skip to step 7.

   The *Select MLS board* page opens, showing you all the MLS boards currently set up.
6. Select the MLS board with the listing you'd like to import information for, then click **OK**.

   The *MLS listing search — [MLS board]* page opens. You can search for a listing from this page.

7. Specify how you would like to search for a listing by selecting the appropriate option button, then specify the corresponding search criteria in the fields that appear below.

   For example, if you select **MLS number**, specify the MLS number in the field below. If there are multiple numbers, separate each number with a comma, like this: 993106,991872, etc.

   Note: If a particular MLS board requires search criteria in addition to the MLS number, additional text fields where you can specify this information will appear. Text fields with an asterisk (*) are required.

   If you select **Advanced search**, you will be able to specify corresponding search criteria in a number of fields. However, the fields may vary from board to board.

8. Click **Next**.

   The *Searching MLS* dialog box opens. If there are any matching properties, the *Select listing from [MLS board]* page opens.

9. Select the property you want to use, then click **Finish**.

   If the address of the property does <u>NOT</u> match what is currently in your listing record, the *Import property information* dialog box opens.

10. Either:

    - click **Update existing** to update the existing listing record for the contact, or

- click **Create new** to open a new property listing record for the same contact. The *Create new property* dialog box opens. Select **Investment** or **Other**, then click **OK**.

The *Listing details for [seller]* page reopens with the MLS information in the record.

Viewing All The Activities That Have Been Performed For A Listing

If you want to see all of the activities that have been performed for a listing, such as appointments or emails, look at the listing's history.

For more information about working with a listing's activities, see *"Assigning activities to a listing" on page 462*.

The activities that appear in a listing's history page have all been marked done. If necessary, you can mark an activity undone. This returns the activity to the **Activities** tab of the listing record, as well as Today's business.

For more information about Today's business, see *"Working With Today's Business" on page 256*.

This section tells you how to:

- view a listing's history (see *page 491*).
- view the details for an activity that has been marked done and appears in a listing's history (see *page 492*). When you view the details for an activity that has been marked done, you can remove the activity from the listing's history.
- generate a report of a listing's history (see *page 493*).
- mark an activity undone (see *page 493*).

Viewing a listing's history

To view a listing's history:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing whose history you'd like to see, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click **View history** from the action menu.

   The *Listing history for [property address]* page opens. This page shows you all of the activities that have been performed for the listing and marked done.

5. To only see a specific activity, such as appointments, select an option from the drop-down list at the top of the page.

Viewing the details for a marked done activity

Because historical activities have been marked done, you can NOT edit their details. However, you can delete the marked done activity so it no longer appears in the listing's history. You can also add new notes and edit existing notes.

You can view the details for a historical activity after you have accessed the *Listing history for [property address]* page for a specific listing. For more information see, *"Viewing a listing's history" on page 491*.

To view the details for an activity:

1. In the *Listing history for [property address]* page, click **View** from the action menu.

   The *View [activity type] for [seller]* page opens.

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

   The *Activity notes* page opens.

3. To:

   - write your own note, click **Add new** and begin typing your note.
   - pick from a list of existing notes already in your system, click **Pick from list**. The *Notes* pop-up window opens. Select a note, then click **OK**.
   - edit an existing note, click where in the note you want to make the edit and begin typing your change.
   - print the notes, click **Print notes**. The Top Producer 7i *Report -- Print Notes* page opens. Click the **Print** icon at the top of the page. The *Print* pop up window opens. Specify print options and then click **Print**.

For more information about pick lists, including how to add an item to a pick list, see *"List Icons" on page 23*.

- view the next 10 notes (if there are a lot of notes added to the listing) click **View 10 more**.
- show ALL the listing's notes, click **View all**.

4. To remove the activity from the listing's history, click **Delete** from the action menu.

   The *Delete activity* dialog box opens.

5. Click **Yes**.

   The *Listing history for [property address]* reopens with the activity no longer appearing.

Generating a report of the listing's history

You can generate a print-able report that shows you ALL of the activities that have been performed for the listing. For more information about working with reports, see *"Viewing And Printing Reports" on page 588*.

You can generate a report after you have accessed the *Listing history for [property address]* page for a specific listing. For more information see, *"Viewing a listing's history" on page 491*.

To generate a report of the listing's history:

1. In the *Listing history for [property address]* page, click **View report** from the action menu.

   The Top Producer 7i — *Listing history* page opens.

2. To print the report, click the **Print** icon at the top of the page. For more information about the how to work with this page, see *"Viewing And Printing Reports" on page 588*.

   The *Print* dialog box opens.

3. Specify print options and then click **Print**.

Marking an activity undone

The activities that appear in a listing's history page have all been marked done. If necessary, you can mark an activity undone. This returns the activity to the **Activities** tab of the listing record, as well as Today's business.

For more information about working with a listing's activities or Today's business, see *"Assigning activities to a listing" on page 462* or *"Viewing the Today's business page" on page 256*.

You can mark an activity undone after you have accessed the *Listing history for [property address]* page for a specific listing. For more information see, *"Viewing a listing's history" on page 491*.

To mark an activity undone:

1. In the *Listing history for [property address]* page, select the activity you'd like to mark undone, then click **Undo mark done** from the action menu.

   The activity is marked undone and removed from the *Listing history for [property address]* page.

Uploading, Updating And Removing Web Site Submission Listings

Before you can upload a listing to a web site, you must set up one or more web sites in the *Setup web sites for listing upload* page. You can access the *Setup web sites for listing upload* page from the **Setup** feature menu. For more information about setting up web sites, see *"Setting Up Listing Upload Web Sites" on page 57.*

This section tells you how to:

- upload a listing (*see page 495*).
- update a listing (*see page 496*).
- remove a listing (*see page 497*).

Uploading a listing

When you upload a listing, the listing appears on all **active** web sites specified in the *Setup web sites for listing upload* page. Any web sites that are specified, but have been deactivated, will not receive new listings or changes to existing listings. For more information about activating and deactivating web sites, see *"Activating or deactivating a listing upload web site" on page 59.*

To upload a listing:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see listings:

   - for a specific date range, click **Date range**. For more information about specifying date ranges, see *"Specifying Date Ranges" on page 26*.
   - with a certain status, such as **Active**, specify a status from the drop-down list.

3. Click **Start search**.

   The listings matching your search criteria appear.

4. Select the listing record you want to upload to a web site, then click **View or edit listing** from the action menu. For more information, see *"Viewing an existing listing" on page 457.*

   The *Listing details for [contact name]* page opens.

5. Click **Upload listing to web sites** from the action menu.

   The *Upload listing to web sites* pop up window opens.

Note: When the listing has been uploaded, the action menu item changes to **Remove listing from web sites.** For more information about updating the listing, see *"Updating a listing" on page 496.*

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6. Click **OK**.

   After a few moments, the listing is uploaded to all the active web sites specified in the *Setup web sites for listing upload* page.

   Depending on how many active web sites specified, an email for each successful — or unsuccessful — upload will be delivered to your office's email address.

Updating a listing

To update a listing:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see listings:

   - for a specific date range, click **Date range**. For more information about specifying date ranges, see *"Specifying Date Ranges" on page 26*.
   - with a certain status, such as **Active**, specify a status from the drop-down list.

3. Click **Start search**.

   The listings matching your search criteria appear below.

4. Select the listing record whose information you want to update, then click the **View or edit listing** action menu item. For more information, see *"Viewing an existing listing" on page 457.*

   The *Listing details for [contact name]* page opens.

5. Click **Update listing on web sites** from the action menu.

6. After a few moments, the listing is updated on all the active web sites specified in the *Setup listing submission web sites* page. For more information about uploading a listing, see *"Uploading a listing" on page 495*.

Removing a listing

To remove a listing:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see listings:

   - for a specific date range, click **Date range**. For more information about specifying date ranges, see *"Specifying Date Ranges" on page 26*.
   - with a certain status, such as **Active**, specify a status from the drop-down list.

3. Click **Start search**.

   The listings matching your search criteria appear below.

4. Select the listing record whose information you want to remove, then click **View or edit listing** from the action menu. For more information, see *"Viewing an existing listing" on page 457.*

   The *Listing details for [contact name]* page opens.

5. Click **Remove listing from web sites** from the action menu.

   After a few moments, the listing is removed from all web sites.

Note: When the listing has been successfully removed from the web sites, the action menu item changes to **Upload listing to web sites.** For more information about uploading a listing, see *"Uploading a listing" on page 495*.

Managing Uploaded Listings

For more information about setting up which web sites listings can be uploaded to, see *“Setting Up Listing Upload Web Sites” on page 57*.

You can manage all listings uploaded to web sites from one page, including removing and updating listings. To upload a listing, however, you must go to the record of the listing you want to upload. For more information about how to upload a listing, see *“Uploading, Updating And Removing Web Site Submission Listings” on page 495*.

This section tells you how to:

- view uploaded listings (see *page 499*).
- remove an uploaded listing (see *page 499*).
- update an uploaded listing (see *page 500*).

Viewing listings

To view uploaded listings:

1. Point to **Listings** and then click **Listing uploads**.

   The *Manage listing uploads* page opens, showing you all the listings uploaded to active web sites.

2. To see only uploaded listings with a specific status, (for example, **Expired**) select an option from the **Listing status** drop-down list. To see listings with any status, select **Show all**.

Removing a listing

To remove a listing:

1. Point to **Listings** and then click **Listing uploads**.

   The *Manage listing uploads* page opens, showing you all the listings uploaded to active web sites.

2. Select the listing(s) you want to remove, then click **Remove listing from web sites** from the action menu.

   The *Remove listing(s)* dialog box opens.

3. Click **Yes**.

   After a few moments, selected listings are removed from all active web sites.

Updating a listing

To update a listing:

1. Point to **Listings** and then click **Listing uploads**.

   The *Manage listing uploads* page opens, showing you all the listings uploaded to active web sites.

2. Select the listing(s) you want to update, then click **Update listing** from the action menu.

   After a few moments, the selected listings are updated on all active web sites.

Mailing Agents Who Have Shown A Listing

These are the types of mailing activities you can create and schedule to send to agents who have shown a listing:

- email
- letter
- postcard
- envelope
- label

For more information about creating and specifying information for listings, see *"Creating And Specifying Information For A Listing" on page 455.*

To mail agents who have shown a listing:

1. Point to **Listings**, then **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26*.

3. Select the listing, then click **Mail showing agents** from the action menu.

   The *Mail showing agents* page opens, showing you all of the showing agents for the selected listing.

To select ALL of the agents, click **Select all** (at the top of the window). For more information about selecting multiple items from lists, *see* *"Selecting Items From Lists" on page 25*.

4. Select the agent(s) you want to mail, then click **Next**.

   The *Mail showing agents* window opens.

5. Select the appropriate option button for the type of mail you want to send the agent (for example, **Email**).

   The *Mail showing agents* page opens.

6. The information you can specify in this window varies, depending on the type of mailing activity you are creating. For more information about creating:

   - an email activity, see *"Working With The Email Template Library" on page 368*.
   - a letter activity, see *"Working With The Letter Library" on page 317*.
   - a postcard activity, see *"Working With The Post-card Library" on page 329*.
   - an envelope activity, see *"Working With The Envelope Library" on page 321*.
   - a label activity, see *"Working With The Label Library" on page 325*.

7. If you are creating an email activity, you may send the email now. Click **Send**.

   The email is sent.

8. If you are creating a postcard, envelope or label activity, you may print the activity now or later. To print a postcard, envelope or label activity:

   - now, click **Print**. The *Print* pop-up window opens. Specify your print setting, then click **OK**.
   - later, click **Print later**. The activity is saved in Today's Business, appearing on the date specified in the activity's **Date** field. For more information about working with Today's business, see *"Working With Today's Business" on page 256.*

Turning A Listing Into A Closing

When a property sells, you must turn the listing record into a closing record. You can locate the listing record for the property that has sold, then turn the listing into a closing.

To turn a listing into a closing:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing you'd like to turn into a closing, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click **Create closing** from the action menu.

   The *Create closing* page opens. For more information on creating a closing, see *"Creating A New Closing" on page 511*.

Viewing A Seller's Contact Record

You can view the contact record for sellers who are associated with a listing. Once you access the contact record, you can add new information or modify existing information.

To view a seller's contact record:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing with the seller whose contact record you'd like to see, then click **View or edit listing** from the action menu.

   The *Listing details for [seller]* page opens.

4. Click **View contact** from the action menu.

   The *Contact details for [seller]* page opens. For more information about editing a contact record, see *"Modifying a contact record" on page 133*.

Setting How To Calculate Expiration Dates And Automatic Reminders

You can set how you want Top Producer 7i to automatically calculate when a listing expires, based on when a listing was created.

Once you have set how listing expiration dates will be calculated, you can set how many days before a listing expires that you'd like to receive an automatic reminder about the upcoming expiry.

To set how to calculate expiration dates and reminders:

1. Point to **Listings**, then click **Listing preferences**.

   The *Listings preferences* page opens.

2. In the:

   - **Expiration date** field, specify how many days must pass before a listing becomes expired.
   - **Expiration reminder** field, specify how many days before a listing expires that you want to be reminded about the upcoming expiry.

3. Click **OK**.

Setting Listing Expiration Reminders

For more information on setting listing preferences, see *"Setting Listing Preferences" on page 109*.

The *Listing expiration reminder* page shows you the listings that are about to expire. You can see the listing address, seller name, agents involved with the listing (if you are part of a team or partnership account), list price, status and expiry date.

To view listing expiration reminders:

1. If you select:

   a) the **Show listing expiration reminders** check box in the **General preferences** section, the *Listing expiration reminder* page will be displayed as soon as you log into the program, reminding you of expiring listings before the expiry date.

   These reminders are calculated on the *Listing preferences* page, (see *"Setting How To Calculate Expiration Dates And Automatic Reminders" on page 505*).

   For example, if the Listing expiration reminder is set to remind you 14 days before the listing expires, the *Listing expiration reminder* page will be displayed every time you log into the program for two weeks prior to the listing expiring.

   b) **Listings**, then click **Listing expiration reminders** from the main menu, the *Listing expiration reminder* page opens.

2. From the *Listing expiration reminder* page:

   - click **Cancel** if you do not want to view the listing(s). You will be returned to the main menu.
   - highlight a listing from the list and click **OK** to view the details of the selected listing(s) that is soon to expire. The *Listing details for [contact name]* page opens.

3. Use the **Previous listing** and **Next listing** links to view each listing.

Note: These links will only be available if you have more than one listing that is soon to expire.

4. Once you've finished viewing the listing(s), click **Close** to return to the main menu.

Deleting A Listing

Make sure you no longer need the listing before deleting it. Once you delete a listing, it can NOT be retrieved.

Note: If you are an assistant or are part of a team or partnership account and the **Delete listing** action menu item is unavailable, this indicates the responsible agent has not granted you deletion permissions. Contact the database owner for deletion rights.

To delete a listing:

1. Point to **Listings** and then click **Current listings**.

   The *Current listings* page opens.

2. To see:

   - listings with a certain status, specify the status from the **View by status** drop-down list. Click **Start search**.
   - listings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, see *"Specifying Date Ranges" on page 26.*

3. Select the listing you want to delete, then click **Delete listing** from the action menu.

   The *Delete listing* dialog box opens.

4. Click **Yes**.

   The listing is deleted.

Working with Closings

In this chapter:

About Closings

The efficiency and ease of using Top Producer 7i to finalize a sale begins with your ability to instantly convert a listing into a closing by simply clicking **Create closing** in the listing. That done, you can now use the comprehensive *Closing services checklist* — which includes all of the main financial and service tasks that must be performed to complete a transaction — as a foundation for custom-creating a closing plan by adding your own to-dos, calls, appointments and correspondence. You can even build your own library of plans for use in a variety of transactions involving specific types of sale conditions, financing, properties, and so on.

Your plan activities can be scheduled for a fixed date, or for a date relative to the offer acceptance date or closing date, and will automatically appear in Today's business as they come due. This ensures you will have a reliable reminder of what needs doing each day to provide excellent service to your sellers and all parties in the transaction.

When the deal is done, you can immediately transfer the property statistics, pictures, etc., to the new buyer.

Creating A New Closing

If you have a client looking to buy a property and you are not listing a property for the client, you can create a closing for the client once you find a suitable property for them to purchase.

The *Create closing wizard* guides you through the steps of creating a closing, based on new or existing seller and buyer information. You also have the option to customize and apply a closing plan, which allows you to keep track of the activities needed to service the closing and automatically remind you when to perform the activities.

To create a new closing:

1. Point to **Closings**, then click **Create closing**.

Note: Alternatively, from the *Current closings* page, click **Create closing**. You can also click **View closings** from the contact record, then click **Create closing**.

The *Create closing wizard* opens.

2. If the seller you are creating the closing for:

a) already exists in your database, select one of the following options in the **Search by** section:

- **Name** — select this option button if you want to search for the seller in your database. Enter the seller's **First name** and **Last name** in the text boxes, then click **Next**.
- **Address** — select this option button if you want to search for the seller's address in your database. Enter the seller's **House number** and **Street name** in the text boxes, then click **Next**.

Once the search results are displayed, proceed to step 3.

Note: If you leave the text boxes empty and click **Next**, all contacts in your database will be retrieved. Proceed to step 3.

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b) does NOT exist in your database, and you want to add a new contact record, select the **Don't search, I will create a new contact record**

for this closing check box. Then, select one of the following options:

- **Show this new contact record in my address book** — select this option if you want the new contact to appear in your address book. Click **Next**.
- **Don't show this new contact record in my address book** — select this option if you do not want the new contact to appear in your address book. This option creates what is known as a "hidden" contact (see *"About hidden contacts" on page 124*). Click **Next**.

  The *Detailed contact entry - Add new contact* page opens. Enter the seller's information, then click **OK**. For more information on adding a new contact record, see *"Creating a contact record" on page 124*. Skip to step 4.

Note: If the contact you just created has multiple properties, the *Create closing* page opens. Select the address you want to create the closing for and then click **Next**. Skip to step 4.

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3. Once the search results are displayed on the *Create closing* page, select the seller from the list and click **Next**.

4. From the *Create closing* page, complete the following:

   - specify the party or parties you represent by choosing the appropriate option button from the top right of the page. For example, if you represent both the seller and the buyer, select the **Seller and Buyer** option button.

Note: Your selection determines who the closing service report is created for, (see *"Closing Service Reports" on page 535*).

   - select additional sellers and/or buyers by highlighting the contact(s) in the **Available contacts** grid and then clicking the **Add** arrow for the appropriate grid.

Note: You can add as many sellers and buyers as you want. If you select more than one buyer at a time without specifying which one is primary, the program will automatically select the first buyer you entered as the primary buyer. For information on setting a primary buyer, see step 11 in *"Working with the Closing parties tab" on page 527*.

To remove a seller or buyer, highlight the contact in the appropriate grid and then click the **Remove** arrow.

- you can use the search feature to look for additional sellers and/or buyers. See step 2(a) for more information.
- if you want to add a new contact, click **Add new contact** from the action menu. The *Detailed contact entry - Add new contact* page opens. See *"Creating a contact record" on page 124* for more information.

5. Once you have selected all the sellers and buyers for this closing, click **Next**.

Note: If you are not subscribed to a team or partnership version of Top Producer 7i, skip to step 8.

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6. To select agents involved with the closing, highlight the agent(s) in the **Listing side** or **Selling side** section, and then click the **Add** arrow.

7. Click **Next**.

8. Select the closing plan you want to assign to this closing by highlighting the plan name from the **Available plans** list.

   If you want to view, edit, or add a new plan, click the **Closing plan library** link in the lower left corner of the page. The *Closing plans* page opens. See *"Creating an action, listing or closing plan" on page 233*.

9. Click **Finish**.

   The *Closing details for [seller name]* page opens.

Adding closing details

The *Closing details for [seller name]* page lets you organize all your information about the closing, make detailed notes, view and modify your closing plan, link to the Flyer library, even send the closing parties email.

There are two tabs: **Closing** and **Service report**. This section describes working with the **Closing** tab. For information on Service reports, see *"Closing Service Reports" on page 535*.

> **Note:** The *Closing details for [seller name]* page can also be accessed from the *Current closings* page. Highlight a closing from the list, then click **View or edit closing** from the action menu.

To add closing details:

> **Note:** If you are modifying a closing with a status of either **Fell thru** or **Closed / Paid Transferred**, certain options will NOT be available. For more information, see *"Changing the closing's status" on page 515*.

1. The address of the property associated with this closing appears in the upper left corner as a hyperlink. To select a different property address to associate with this closing, click the link.

   The *Select address* page opens.

2. Choose a different address from the **Current sellers** list for the closing, then click **OK**.

3. In the upper right corner, select one of the following options, depending on whom you represent.

   - **Buyer**
   - **Seller**
   - **Buyer and Seller**

> **Note:** Your selection determines who the closing service report is created for, (see *"Closing Service Reports" on page 535*).

4. Complete the following fields:

   - **Acceptance date** — type the acceptance date for the closing or click the calendar icon to select a date.
   - **Closing date** — type the closing date or click the calendar icon to select a date.

- **Possession date** — Type the possession date or click the calendar icon to select a date.
- **Sale price** — Type the agreed upon sale price of the property.
- **MLS number** — Type the MLS number for the property. The MLS number was assigned when the listing was originally posted on an MLS board. If the property was never listed on an MLS board, leave this field blank.
- **Status** — Click the drop-down list and select the status of the new closing, such as **Pending (showing)**, **Pending (not showing)**, **Pending / Backup** or **Pending / Firm**.
- **Commission** — Type the commission amount you will make on the sale of this property.
- **File number** — Type the closing's file number. This is for your own reference only and is not a required field.
- **Property type** — Enter a property type description or click the list icon to select from a pick list of preset items. For example, **New - single family**.
- **Source** — Type the source of the closing, or click the list icon and select from a pick list of preset items. For example, **Referral**, **Lawn sign**, etc.

Changing the closing's status

When a closing's status changes to **Closed / Paid** or **Fell thru**, the closing will become "frozen", thereby disabling some of the action menu items and locking certain closing details.

The following action menu items will be disabled:

- **View or add property photos**
- **Transfer property**

On the *Closing details for [contact name]* page, the following are disabled:

- **Closing address** hyperlink
- **Buyer and Seller representation** options
- **Acceptance date** field
- **Closing date** field
- **Possession date** field
- **Sale price** field
- **MLS number** field
- **Commission** field
- **File number** field
- **Property type** field
- **Source** field

- **Activities** tab (**Add**, **View or edit**, **Delete**, and **Select plan** hyperlinks)
- **Closing parties** tab (**Add from closing contact list**, **Add from address book**, **Change role**, **Remove** and **Set this buyer as the primary** hyperlinks)
- **View property statistics** action menu item (although the action menu item is enabled, the stats themselves are locked and cannot be modified).

> **Note:** For frozen records, you can still edit the contact's record and the data will be saved in the Address book, however, the snapshot information will NOT be updated on the *Closing details for [contact name]* page.

Assigning activities to a closing

> **Note:** If you are modifying a closing with a status of either **Fell thru** or **Closed / Paid Transferred**, you will NOT be able to modify the closing's activities.

1. Click the **Activities** tab to work with the activities associated with the closing plan you selected when you created this closing. Do the following:

    - Click the column heading (or the little black arrow) to sort the activities by date, activity type, description, completed activities, and the assignee.
    - Select the **Stop reminders** check box if you do not want these activities to appear in Today's business. See *"Working With Today's Business" on page 256*.
    - Click the **Add** link to add a new closing activity.
    - Highlight an activity from the list, then click the **View or edit** link to make modifications to the closing activity.
    - Highlight an activity from the list, then click the **Delete** link to remove an unwanted activity. When the *Delete activities* dialog box is displayed, click **Yes** to proceed.
    - Click the **Select plan** link to display the *Select closing plan* pop-up window. Highlight the closing plan(s) you want to add from the **Available plans** list, click **Add** to move them to the **Current plans** list. Click **OK**.

    See *"Modifying an assigned closing service plan" on page 546*.

Adding miscellaneous notes

To add notes, click the Notes tab and use the following links:

- Click **Add new** to insert a new note.
- Click **Pick from list** to open a pick list, from which you can select a commonly used comment.
- Click **Print notes** to create a closing notes report in a new browser window that you can send to the printer.
- If you have more than 10 notes, click **View 10 more** to view them in multiples of ten.
- Click **View all** to view all the notes.

Specifying closing parties

Click the **Closing parties** tab to work with the closing parties involved with this closing. You can add, remove, change the selected party's role, perform a mailing, or send an email. See *"Working With Closing Parties" on page 527*.

Managing closing agents

If you are part of a team account, click the **Agent(s)** tab to view agents associated with the closing. For more information, see *"Managing Closing Agents" on page 532*.

Applying scheduled reports

Click the **Scheduled reports** tab to apply automatic closing report plans, view, edit, or delete closing service reports. See *"Closing Service Reports" on page 535* and *"Closing Service Plans" on page 546*.

Viewing property statistics

You can view or edit the property statistics from the *Closing details for [seller name]* page. Information includes room dimensions, land assessment, tax assessment, house style, property description, etc. This is discussed in more detail in the *Contacts* chapter. See *"Managing Contacts" on page 121*.

Note: You can also access property statistics from the seller's contact record.

1. Click **View property statistics** from the action menu.

   The **Property statistics** tab of the *Contact details for [seller name]* page opens.

2. View or edit statistics for the closing property.

Note: If the closing you are currently working with has a status of either **Fell thru** or **Closed / Paid Transferred**, you will <u>NOT</u> be able to modify the closing's property statistics.

3. Click **Close** to return to the *Closing details for [contact name]* page.

Viewing or adding property photos

You can view, add, or remove property photographs from the *Closing details for [seller name]* page.

Note: If the closing you are currently working with has a status of either **Fell Thru** or **Closed / Paid Transferred**, the **View or add property photos** action menu item will NOT be available.

1. Click **View or add property photos** from the action menu.

   The **Pictures** tab of the *Contact details for [seller name]* page opens.

   - Click the **Picture** drop-down list to select the type of picture you want to view or add: **Property** or **Map**.
   - Check the **Display picture** check box to see a preview of the picture.
   - Click the **Add** link to add a new picture. The *Select picture* pop-up window appears. Browse your computer and select the file to add. Click **Open**.
   - Use the **Merge code** drop-down list to select the merge code you want to associate with the picture, for example **view_garden**, **view_pool**, etc.
   - Click the **Remove** link to remove the current picture from the record.

Note: Removing a picture from a record does not affect the local copy on your computer.

   - Use the **<<Previous** and **Next>>** buttons to view any other pictures you have loaded. The picture in view when you leave this page will be used as the default.

2. Click **Close**.

Viewing Or Editing A Current Closing

The *Current closings* page displays a list of all your closings. From this page you can fully manage your closing records, and do the following:

- View or edit a selected closing
- Create a new closing
- Delete a selected closing
- Generate a closing report

Viewing a selected closing

You can view a list of your current closings by specifying a date range or by selecting the closing type. In addition, the *Current closings* page displays the **Total volume** and **Total commissions** amounts for the displayed list in the bottom left corner of the page.

To view your current closings:

1. From the main menu, point to **Closings**, then click **Current closings**.

   The *Current closings* page opens.

2. To see:

   - closings created within a specific date range, click the **Date range** link to open the *Enter date range* pop-up window. Clear the **No date range** check box, then specify a date range by using the calendar icons. Select the **No date range** check box only if you do not want to specify a date range. Click **OK**.
   - closings with a specific status, click the **View by status** drop-down list and choose a closing status, such as **All statuses**, **Closed / Paid**, **Fell Thru**, etc. Click **Start search**.

3. The current closings are listed in the grid, based on the viewing criteria you specified. The page shows you an overview of the following information:

- **Property address**
- **Seller name**
- **Buyer name**
- **Agent(s)** (if you are part of a team account)
- **File number**
- **Sale price**
- **Status**
- **Closing date**

4. Use the action menu items to work with the current closings:

    - Click **View or edit closing** to open the selected closing's details. See *"Adding closing details" on page 513*.
    - Click **Create closing** to create a new closing. See *"Creating A New Closing" on page 511*.
    - Click **Delete closing** to permanently delete the selected closing. When the *Delete closing* dialog box is displayed, click **Yes** to proceed.
    - Click **View report** to generate a summary report of all your closings, a detailed report of selected closings, or a closing service report. See *"Closing Service Plans" on page 546* and *"Closing reports" on page 596*.

5. Click **Close**.

Editing a selected closing

Use the *Current closings* page to select and edit specified closings.

To edit a selected current closing:

1. From the main menu, point to **Closings**, then click **Current closings**.

2. From the *Current closings* page, highlight the closing(s) you want to edit, or click **Select all**.

3. Click **View or edit closing** from the action menu.

    The *Closing details for [seller name]* page opens. For details on working with the fields and tabs on this page, see *"Creating A New Closing" on page 511*.

4. As the status of the closing changes — for instance, from **Pending (showing)** to **Pending (not showing)** or **Pending / Firm**, use the **Status** drop-down list to adjust the status accordingly.

Note: If you change the closing's status to **Fell thru** or **Closed / Paid Transferred** you will NOT be able to modify certain areas of the closing.

5. Use the action menu items to perform the following functions:

    - Viewing and printing closing and service reports. See *"Closing reports" on page 596* and *"Closing Service Reports" on page 535*.
    - Viewing or editing property statistics. See *"Viewing property statistics" on page 517*.
    - Viewing or adding property photos. See *"Viewing or adding property photos" on page 519*.
    - Transferring the property. See *"Closing a sale and transferring the property" on page 522*.
    - Viewing the historical activities associates with this closing. See *"Viewing the closing's history" on page 524*.
    - Deleting the selected closing. See *"Deleting the closing" on page 525*.

6. Click **Close**.

Closing a sale and transferring the property

When the status of a closing changes to **Closed / Paid**, you can click **Transfer property** to transfer the property to the buyer.

If you change the closing status to any option, except **Pending (showing)**, you will be asked whether you want all the reminders about outstanding tasks in your closing services plan to be stopped, so they do not appear in Today's business.

Note: If the closing you are currently working with has a status of either **Fell thru** or **Closed / Paid Transferred**, the **Transfer property** action menu item will NOT be available.

To close the sale and transfer the property:

1. From the *Closing details for [seller]* page, select **Closed / paid** from the **Status** drop-down list.

    If there are outstanding reminders associated with this closing the *Stop reminders* dialog box opens.

2. Click **Yes** to stop outstanding reminders.

The *Transfer property* dialog box opens, asking if you want to transfer the property now.

3. Click **Yes** to proceed.

   The *Transfer property* page opens.

4. Click one of the following option buttons to set the property type:

   - **New primary property** — if this buyer already has a primary property and you choose this option, two more options appear: **Change it to an investment property** or **Delete the property**. Depending on whether they are keeping their old property or selling it, determines which option you select.
   - **An investment property** — choose this option if the buyer already has a primary property, and this property is for investment purposes.

5. Click **Next**.

You can also select **Don't choose a property at this time** if you do not wish to specify the seller's new property.

6. From the *Transfer property* page, select the **Add a new property** option, then click **Next**.

7. In the new address page, fill in all the fields you can for the seller's new primary address, then click **Next**.

8. Verify that the new address for the seller is correct, and that you transferred the closing property correctly, then click **Finish**.

9. Click **Close** to exit the *Closing details for [seller]* page.

10. From the main menu, point to **Contacts** and click **Address book**.

11. In the Address book, select the contact whose home you just sold, then click **View or edit contact**.

12. Under the **Contact** tab, click **Action plan**, then click **Select plan** from the action menu.

13. In the *Plans assigned to [contact]* page, highlight **10-Year After Sale Prospecting Plan**, (or

another appropriate **After Sale Prospecting Plan** you have created), then click **Add**.

14. Enter the date you want the plan to start on in the **Start date** box, then click **OK**.

For more information on modifying action plans, see *"Action, Listing And Closing Plans" on page 232*.

15. Make any changes you want to the Contact record, then click **Close**.

    If it is appropriate for you to do so, repeat steps 10 - 15 for the new owner of the home you sold. In addition, you might consider applying, for instance, a **5-Year Sphere Of Influence Prospecting Plan** to one or more of the other professionals involved in the transaction.

If a deal falls thru:

1. In the *Closing details for [seller]* page, select **Fell thru** from the **Status** drop-down list box.

2. If you want to stop the outstanding closing plan reminders from appearing in Today's business, click **Yes** in the *Stop reminders* dialog box. If you do not want the reminders to stop, click **No**.

Viewing the closing's history

You can view the closing's history from the *Closing details for [seller name]* page. Items you can see include activities, such as sent email, appointments, letters, closing to-dos, etc.

To view the selected closing's activity history:

1. From the *Closing details for [seller name]* page, click **View history** from the action menu.

   The *Closing history for [property address]* page opens, showing you the following overview information:
   - **Date** — displays the date the activity was created.
   - **Activity** — displays the type of activity.
   - **Description** — displays the item's description.

2. Click the **Select the type of history items you want to view** drop-down list and choose the type of completed activity you want to see; or choose **All**.

3. Highlight a completed activity from the list. You can:

   - click **View** from the action menu to see the activity's details. From the *View [activity type] for [property address]* page, click **Notes** from the action menu to view, add new, or print the activity's notes; or click **Delete** from the action menu to delete the selected activity. Click **Close**.

- click **View report** from the action menu to display the "*Closing history report for [property address]*" in a new browser window. Use the browser controls to print the report.
- click **Delete** from the action menu to permanently remove the selected activities from the list. When the *Delete* dialog box opens, click **Yes** to continue.
- click **Undo Mark done** from the action menu to reverse a completed activity's status from "marked done". The item will no longer be shown on this page.

4. Click **Close**.

Deleting the closing

You can delete a selected closing from the *Current closings* page, or while you are viewing its details.

Note: If you are an assistant or are part of a team or partnership account and the **Delete closing** action menu item is unavailable, this indicates the responsible agent has not granted you deletion permissions. Contact the database owner for deletion rights.

To delete a selected closing from the Current closings page:

1. From the main menu, point to **Closings**, then click **Current closings**.
2. Highlight a closing on the *Current closings* page, then click **Delete closing** from the action menu.
3. When the *Delete closing* dialog box is displayed, click **Yes** to proceed.

To delete a selected closing while viewing it:

1. From the *Closing closings* page, highlight a closing from the list.
2. Click **View or edit closing** from the action menu.

   The *Closing details for [seller name]* page opens.
3. Click **Delete closing** from the action menu.

   The *Delete closing* dialog box opens.

4. Click **Yes** to confirm the deletion of the selected closing.

Working With Closing Parties

The **Closing parties** tab on the *Closing details for [seller name]* page, lets you keep track of everyone involved in the sale of a property: seller, buyer, buyer agent, lawyers, bankers, etc.

> **Note:** If the closing you are currently working on has a status of either **Fell thru** or **Closed / Paid Transferred**, some options will NOT be available.

Working with the Closing parties tab

1. From the *Current closings* page, highlight a closing from the list, and click **View or edit closing** from the action menu.

   The *Closing details for [seller name]* page opens.

2. Click the **Closing parties** tab.

3. Highlight a party in the list box to display their details to the right of the list box.

4. You can view any of the closing parties' contact records at any time by highlighting the desired party in the list, then clicking the **View contact** link.

   The *Contact details for [contact name]* page for the selected party opens. For more information on viewing and modifying a contact's information, see *"Viewing And Modifying Contacts" on page 132*.

5. Click **Close** to return to the **Closing parties** tab.

6. To add a closing party from the **Closing contact** list:

   - Click the **Add from closing contact list** link.
     The *Add party from closings contact list* page opens.

- Highlight the contact you want to add in the **Closing contact list** section, then click **Add to parties in this closing**.

  The contact will appear in the **Parties in this closing** list.
- Click **Close** to return to the **Closing parties** tab.

7. To add a closing party from the Address book, click the **Add from address book** link.

   The *Select contacts* page opens.

8. To:

   - search for a seller or buyer, select how you want to search by selecting the appropriate option button from the **Search contact by** section. Enter your search criteria in the fields and then click **Start search**.

     The search results will be shown in the list box.
   - add additional sellers and/or buyers, highlight the contact(s) in the **Available contacts** grid and then click the **Add** arrow.

Note: You can add as many sellers and buyers as you want.

     To remove a seller or buyer, highlight the contact in the appropriate grid and then click the **Remove** arrow.
   - add a new contact, click **Add new contact** from the action menu. The *Detailed contact entry - Add new contact* page opens. Enter the contact's information and then click **OK**.

     A pop-up window opens asking you to specify the new contact's role. Select either the **Seller**, **Buyer** or **Other** option button.

     If you chose either the **Seller** or **Buyer** option, click **OK** and skip to step 7.

     If you chose the **Other** option:

     - Enter the party's description in the adjacent text box or click the list icon to select a preset item.
     - Specify whether the party represents the listing or selling side by selecting either the **Represents the listing side** or **Represents the selling side** check box.
     - Click **OK**.

9. To change the role of a closing party:

    - Highlight the desired contact under the **Name** heading, then click **Change role**. The *Change role for [contact name]* pop-up window opens.

Note: You cannot change the role or delete the primary closing party from the list. You will notice that these options are not available when the primary closing party is highlighted.

    - Select one of the following options: **Seller**, **Buyer**, or **Other**.

      If you chose either the **Seller** or **Buyer** option, click **OK** and skip to step 8.

      If you chose the **Other** option:

        - Enter the party's description in the adjacent text box or click the list icon to select a preset item.
        - Specify whether the party represents the listing or selling side by selecting either the **Represents the listing side** or **Represents the selling side** check box.
        - Click **OK**.

10. To remove a closing party from the displayed closing:

    - highlight the desired contact then click **Remove**. The *Remove parties* dialog box opens.
    - click **Yes**.

11. To send an email to a closing party, highlight the name of the contact, then click the **Send email** link. For more information on sending an email, see *"Composing And Sending Email" on page 352*.

12. To send a letter, envelope, label or postcard to a closing party, highlight the name of the contact, then click the **Perform mail out** link. For more information on performing a mail out, see *"Performing A Mail Out" on page 337*.

13. To set a primary buyer for the displayed closing, select the contact and then click the **Set this buyer as primary** link.

    The buyer's role will be changed to **Primary** buyer.

Managing the closing contact list

An unlimited number of closing contacts can be added to the master closing contact list. Closing contacts are individuals or professionals (lawyers, mortgage brokers, inspectors, etc.) who you frequently work with in the closing of a sale. Having a master list of these contacts allows you to quickly and conveniently add any of them to a new closing file.

Note: For instructions on managing closing parties for a particular closing, see *“Working with the Closing parties tab” on page 527*.

1. From the *Current closings* page, highlight a closing from the list, and click **View or edit closing** from the action menu.

   The *Closing details for [seller name]* page opens.

2. Click the **Closing parties** tab.

   Parties involved with the displayed closing are shown.

3. Click **Add from closing contact** list.

   The *Add party from closings contact list* page opens.

4. To add a contact to the **Closing contact** list:

   - Click the **Add** link from the **Closing contact list** section.

     The *Select contacts* page opens.
   - Highlight the contact(s) you want to add to the closing contact list, then click the **Add** arrow.

     The contact(s) move to the **Selected contacts** list.
   - Click **OK**.

     The *Change role for [contact name]* pop-up window opens. See the second bullet in step 6 for instructions on assigning a closing party role.

5. To remove a contact from the **Closing contact** list:

   - In the **Closing contact list** section, highlight the party and then click **Remove**.

     The *Remove from closing contact list* dialog box opens.
   - Click **Yes**.

6. To change the role of a party:

- In the **Closing contact list** section, highlight the desired contact under the **Name** heading, then click **Change role**.

  The *Change role for [contact name]* pop-up window opens.

Note: You cannot change the role or delete the primary closing party from the list. You will notice that these options are not available when the primary closing party is highlighted.

- Select one of the following options: **Seller**, **Buyer**, or **Other**.

  If you chose either the **Seller** or **Buyer** option, click **OK** and skip to step 7.

  If you chose the **Other** option:

  - Enter the party's description in the adjacent text box or click the list icon to select a preset item.
  - Specify whether the party represents the listing or selling side by selecting either the **Represents the listing side** or **Represents the selling side** check box.
  - Click **OK**.

7. To view the contact record of any party listed in the **Closing contact list** section:

   - Click **View or edit**.

     The *Contact details for [contact name]* page opens. For more information on modifying contact information, see *"Viewing And Modifying Contacts" on page 132*.

   - Once you are finished viewing the contact record, click **Close**.

     The *Add party from closings contact list* page opens.

8. Once you've completed editing the **Closing contact** list, click **Close** to return to the *Closing details for [contact name]* page.

Managing Closing Agents

If you are part of a team account, click the **Agent(s)** tab to view agents associated with a closing.

1. From the main menu, point to **Closings** and then click **Current closings**.

   The *Current closings* page opens.

2. Select a closing and then click **View or edit closing** from the action menu.

   The *Closing details for [contact name]* page opens.

3. Click the **Agent(s)** tab.

   All agents involved with the displayed closing are displayed.

4. To add an agent:

   - Click the **Add or Remove** link.
     The *Agent(s)* page opens.
   - In the **Listing side** or **Selling side** section, select the agent you want to add from the **Available agents** grid, and then click the **Add** arrow.
     The agent's name appears in the **Selected agents** grid.
   - Click **OK** from the control menu to return to the *Closing details for [contact name]* page.

5. To remove an agent:

   - Click the **Add or Remove** link.
     The *Agent(s)* page opens.
   - In the **Listing side** or **Selling side** section, select the agent you want to remove from the **Selected agents** grid, and then click the **Remove** arrow.
     The agent's name moves to the **Available agents** grid.
   - Click **OK** from the control menu to return to the *Closing details for [contact name]* page.

Creating A Closing From A Listing

This section shows you how to create a comprehensive closing, once your seller has accepted the offer.

To create a closing from an existing listing:

1. From the main menu, point to **Listings** and click **Current listings**.

2. Highlight the listing you want to create the closing from and click **View or edit listing**.

3. In the *Listing details for [seller]* page, click **Create closing** from the action menu to immediately create a closing for the seller.

   The *Create closing - indicate representation and/or select additional sellers and buyers* page opens.

4. If you want to search for an additional buyer and/or seller, in the **Search contact by** section select one of the following options, then click **Start search**:

   - **Name** — select this option button if you want to search for the contact by name. Enter the search criteria in the **First name**, **Last name**, or **Company name** text boxes.
   - **Address** — select this option button if you want to search for the contact's address. Enter the search criteria in the **House number**, **Street name**, **City**, **State**, or **Zip code** text boxes.
   - **Contact type** — select this option button if you want to search by contact type. The **Contact types** drop-down list appears, from which you can make a selection.
   - **All contacts** — select this option button if you want to display all contacts in the database. The contacts are displayed without having to click **Start search**.

5. Specify the party or parties you represent by choosing the appropriate option button from the top right of the page. For example, if you represent both the seller and the buyer, select the **Seller and Buyer** option.

6. Select additional sellers and/or buyers by highlighting the contact(s) in the **Available contacts** grid, then clicking the appropriate **Add** arrow.

   The selected contacts will be moved to the **Selected seller(s)** or **Selected buyer(s)** grid.

Note: You can add as many sellers and buyers as you want. If you select more than one buyer at a time without specifying which one is primary, the program will automatically select a primary buyer at random (usually the first selection).

7. To remove a seller or buyer, highlight the contact in the appropriate grid, then click the **Remove** arrow.

8. Click **Next**.

   The *Create closing - select closing plan(s)* page opens.

If you want to view, edit or add a new plan, click the **Closing plan library** link (see *"Action, Listing And Closing Plans" on page 232*).

9. Select the closing plan you want to assign to this closing by highlighting the plan name from the **Available plans** list.

10. Click **Finish**.

Closing Service Reports

The closing service report feature lets you generate a report of services that have been performed in order to close a sold listing.

You can:

- create a closing service report (see *page 535*).
- add activities to a closing service report (see *page 539*).
- manage a closing service report's activities (see *page 540*).
- manage a closing service report's automatic reports (see *page 541*).
- manage the plans for a closing service report's automatic reports (see *page 543*).

Creating a closing service report

This section tells you how to create a closing service report, that can later be printed or published for viewing on the web.

1. From the main menu, highlight **Closings** and then click **Current closings**.

   The *Current closings* window opens.

2. To see:

   - closings with a certain status, specify the status from the **View by status** drop-down list box. Click **Start search**.
   - closings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, refer to *"Specifying Date Ranges" on page 26.*

3. Select the closing you want to create a service report for, and then click **View or edit closing** from the action menu.

   The *Closing details for [Buyer name]* window opens.

4. Click the **Service report** tab.

An alternative way to access the *Closing service report* window is by clicking **View report** from the action menu on the *Current closings* window or from the **Closing** tab on the *Closing details for [Seller name]* window. When the *Report options* window opens, select the **Closing service report** option button, and then click **Create service report** from the control menu.

5. Click **Report** from the action menu.

   The *Closing service report* window opens.

6. Select the seller you want to create the report for by selecting an option from the **Create for:** drop-down list box.

7. In the **Introductory comments** and **Summary remarks** sections, you can:

   - spell check the comments by clicking the **Spell check** link.
   - add a new comment by clicking either the **Introductory comments** and **Summary remarks** links.
     The *Insert comments/remarks* window opens.
     Specify whether you want to add an introductory or summary remark by selecting the appropriate option button.
     Click **Add new** from the action menu.
     The *Add comment* pop-up window opens.
     Enter a description and comments in the appropriate sections, and then click **OK**.
     The comment is saved for future use.
     Click **OK** to return to the *Closing service report* page.
   - set a comment as default by clicking either the **Introductory comments** and **Summary remarks** links.
     The *Insert comments/remarks* window opens.
     Select the comment you want to set as default from the **Comment description** section.
     Click **Set as default** from the action menu.
     The word **(Default)** appears beside the comment.
     Each time a service report is created, the default comment will be applied. However, you can change the default comment at any time.
     Click **OK** to return to the *Closing service report* window.
   - remove a comment by clicking either the **Introductory comments** and **Summary remarks** links.
     The *Insert comments/remarks* window opens.
     Select the comment from the **Comment description** section, and then click **Delete** from the action menu.
     You can NOT delete a comment that is set as default.
     Click **OK** to return to the *Closing service report* window.

8. In the **Report options** section:

   - select the **Include property picture** check box to include the property picture in the report.
   - select the **Include cash expenses** check box if you want to include expenses in the report.
   - specify advanced report options by clicking the **Advanced report options** link.
     The *Report options* window opens.

     In the **Include/exclude** tab specify the information you want to include in the report by selecting the appropriate check box(es).
     To save these settings for future use, click the **Remember options** link. The *Set as default* dialog box opens. Click **OK** to set the specified report options as default. These options will be used when future closing service reports are created. However, you can modify these options at any time.
     Click the **Load default options** link to use default options you have specified in the past. When the *Restore defaults* dialog box opens, click **Yes**.

     Click the **Report text** tab to specify the report's heading and body information. Type the heading and body information in the appropriate boxes.
     To save these settings for future use, click the **Remember options** link. The *Set as default* dialog box opens. Click **OK** to set the specified report text as default. This text will be used when future closing service reports are created. However, you can modify this text at any time.
     Click the **Load default options** link to use the default text you have specified and saved in the past. When the *Restore defaults* dialog box opens, click **Yes**.

     Click the **Colors** tab to specify the report's background and font colors. Specify the report's background and font colors by clicking a color in the appropriate section. A preview of how the report will look with the specified colors is displayed on the right.

     To save these settings for future use, click the **Remember options** link. The *Set as default* dialog box opens. Click **OK** to set the specified settings as default. These settings will be used when future closing service reports are created. However, you can modify these settings at any time.
     Click the **Load default options** link to use the

default color settings you have specified in the past. When the *Restore defaults* dialog box opens, click **Yes**.
- Click **OK** to return to the *Closing service report* window.

9. In the **Service activities** section:

   - specify the date range of the activities you want to include on the report by entering a date in the **from** and **to** text boxes, or by clicking the calendar icons.
   - add an activity to the report by clicking **Add activity** from the bottom left corner of the page. Enter the activity's details, and then click **OK**.
     For more information on entering an activity, see *page 539*.
   - modify an activity by clicking **Change activity** from the bottom left corner of the page. Modify the activity's details, and then click **OK**.
     For more information on modifying an activity's details, see *page 539*.
   - remove an activity from the report by selecting the activity and then clicking **Delete activity** from the bottom left corner of the page. When the *Delete* dialog box opens, click **Yes**.

10. Once you've finished specifying the report information, click **Save and print later** from the control menu.

    The *Print later* pop-up window opens.

11. Specify:

    - the report's name in the **Report name** field.
    - the date you want to send the report by typing a in the **Date** field, or by clicking the calendar icon.
    - who to assign the report to by selecting an option from the **Assigned to** drop-down list box.

12. Click **OK**.

    The report will be displayed in Today's business on the date you specified. For more information about working with service reports from Today's business, *see* *"Working With Service Reports From Today's Business" on page 286.*

Adding activities to a closing service report

This section tells you how to add activities to a closing service report.

1. From the main menu, highlight **Closings** and then click **Current closings**.

   The *Current closings* window opens.

2. To see:

   - closings with a certain status, specify the status from the **View by status** drop-down list box. Click **Start search**.
   - closings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, refer to *“Specifying Date Ranges” on page 26.*

3. Select the closing you want to create a service report for, and then click **View or edit closing** from the action menu.

   The *Closing details for [Buyer name]* window opens.

4. Click the **Service report** tab.

5. To add an activity to the service report:

   - click **Add activity** from the action menu. The *Add activity for [Closing address]* pop-up window opens.
   - enter the activity’s description by typing in the **Description** field, or click the list icon to select a preset item.
   - enter the activity’s date by typing in the **Date** field, or clicking the calendar icon.
   - enter the time of the activity by typing in the **Time** field, or by using the spin buttons.
   - enter the total cost it took to perform the activity by typing a value in the **Cost** field.
   - enter any details for the activity by typing in the **Details** section, or click the **Details** link to select a preset item.
   - click **OK**.

6. Repeat step 5 for each activity that you need to add to the service report.

7. Click **Close** to return to the *Current closings* window.

Managing a closing service report's activities

This section tells you how to add, modify and delete a closing service report's activities.

1. From the main menu, highlight **Closings** and then click **Current closings**.

   The *Current closings* window opens.

2. To see:

   - closings with a certain status, specify the status from the **View by status** drop-down list box. Click **Start search**.
   - closings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, refer to *"Specifying Date Ranges" on page 26.*

3. Select the closing you want to create a service report for, and then click **View or edit closing** from the action menu.

   The *Closing details for [Buyer name]* window opens.

4. Click the **Service report** tab.

5. To:

   - add an activity to the report, click **Add activity** from the action menu. Enter the activity's details, and then click **OK**.
     For more information on entering an activity, see *page 539*.
   - modify an activity, click **Change activity** from the action menu. Modify the activity's details, and then click **OK**.
     For more information on modifying an activity's details, see *page 539*.
   - remove an activity from the report, select the activity and then click **Delete activity** from the action menu. When the *Delete* dialog box opens, click **Yes**.

6. Click **Close** to return to the *Current closings* window.

Managing a closing service report's automatic reports

You can apply an automatic report to a closing service report plan. Only one automatic report can be applied at a time.

This section tells you how to:

- apply a plan (see page 541).
- remove a plan (see page 542).
- view and edit a plan (see page 542).
- create a new plan (see page 542).
- copy a plan (see page 542).
- rename a plan (see page 244).
- delete a plan (see page 244).

To manage a service report's automatic report plans:

1. From the main menu, highlight **Closings** and then click **Current closings**.

   The *Current closings* window opens.

2. To see:

   - closings with a certain status, specify the status from the **View by status** drop-down list box. Click **Start search**.
   - closings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. For more information, refer to *"Specifying Date Ranges" on page 26.*

3. Select the closing you want to create a service report for, and then click **View or edit closing** from the action menu.

   The *Closing details for [buyer name]* window opens.

4. Click the **Service reports** tab.

5. Click the **Automatic reports** action menu item.

   The *Closing report plans* window opens.

To apply a plan:

You can only apply one plan to a listing or closing at a time. This means that if you have plan A applied, but want to apply plan B, you must remove plan A.

1. Select the plan you want to apply, then click **Apply** from the action menu.

   The word "**Yes**" appears in the **Applied** column.

To remove a plan:

1. Select the plan you want to remove, then click **Remove applied** from the action menu.

   The word “**No**” appears in the **Applied** column.

To view or edit a plan:

1. Select the plan you want to view or edit, then click **View or edit** from the action menu.

   The *View or edit report plan [report name]* window opens.

   From here you can manage the plan’s scheduled reports, including adding a new report and modifying an existing report. See *“Managing the plans for a closing service report’s automatic reports” on page 543.*

To create a new plan:

1. Click **Create new** from the action menu.

   The *Create new report plan* dialog box opens.

2. In the **Report name** field, type a new name.

3. Click **OK**.

   The *View or edit report plan [report name]* window opens.

   From here you can manage the plan’s scheduled reports, including adding a new report and modifying an existing report. See *“Managing the plans for a closing service report’s automatic reports” on page 543.*

To copy a plan:

1. Select the plan you want to copy, then click **Copy** from the action menu.

   The *Copy report plan* dialog box opens.

2. In the **Report plan name** field, type a new name (if necessary).

3. Click **OK**.

   The *View or edit report plan [report name]* window opens. From here you can manage the plan’s scheduled reports, including adding a new report and modifying an existing report. See *"Managing the plans for a closing service report's automatic reports" on page 543.*

To rename a plan:

1. Select the plan you want to rename, then click **Rename** from the action menu.

   The *Rename report plan* dialog box opens.

2. In the **Report name plan** field, type a new name.

3. Click **OK**.

   The plan is renamed.

To delete a plan:

1. Select the plan you want to delete, then click **Delete** from the action menu.

   The *Delete report plan* dialog box opens.

2. Click **Yes**.

   The plan is deleted.

Managing the plans for a closing service report's automatic reports

You can work with the plans within an automatic report plan. This section tells you how to:

- add a new report to a plan (*see page 245*).
- rearrange reports in a plan (*see page 246*).
- modify an existing report (*see page 247*).
- delete an existing report (*see page 247*).

To manage plans for a closing service report's automatic reports:

1. From the main menu, highlight **Closings** and then click **Current closings**.

   The *Current closings* window opens.

2. To see:

   - closings with a certain status, specify the status from the **View by status** drop-down list box. Click **Start search**.
   - closings created within a specific date range, click **Date range**. Specify the date range, then click **OK**. See *"Specifying Date Ranges" on page 26.*

3. Select the closing you want to create a service report for, and then click **View or edit closing** from the action menu.

   The *Closing details for [buyer name]* window opens.

4. Click the **Service reports** tab.

5. Click the **Automatic reports** action menu item.

   The *Closing report plans* window opens.

6. Select the plan you want to view or edit, then click **View or edit** from the action menu.

   The *View or edit report plan [report name]* window opens.

To add a new report:

1. Click **Add new** from the action menu.

   The *Add new plan item* window opens.

2. In the **Report name** field, type a name for the new report.

3. From the **Assigned to** drop-down list, specify a person to assign the report to.

4. Schedule how many days, weeks or months after the previous report the new report should run. Either type a number value in **Schedule this report** field or use the spin buttons, then, from the adjacent drop-down list, select **Day(s)**, **Week(s)** or **Month(s)**.

5. Specify whether to include all activities that occurred since the previous report or since the start of the plan by selecting the appropriate option button.

To add new comments, click **Add new** from the action menu. The *Add comment* dialog box opens. Type a description, then the comments, and then click **OK**.

To set a default comment, select the comment, then click **Set as default** from the action menu.

To delete a comment, select the comment, then click **Delete**.

6. To include introductory comments or summary remarks, either type the comments in the **Introductory** or **Summary** area, or click **Introductory comments** or **Summary remarks** to insert existing text. If you have selected to insert existing text, the *Insert comments/remarks* window opens.

   Select whether you want to select introductory or summary text by selecting the appropriate option button, then, in the **Comments description** area, select the text you want. Click **OK**.

   The *Add new plan item* window reopens.

7. To spell check:

   - introductory comments, click **Spell check** (top right of the **Introductory comments** area).
   - summary remarks, click **Spell check** (top right of the **Summary remarks** area).

8. Click **OK**.

   The *View or edit report plan [report name]* window reopens with the new report.

To rearrange the order of reports:

1. Select the report you want to move, then click **Move up** or **Move down** from the action menu as many times as necessary.

To modify an existing report:

1. Select the report you want to modify, then click **View or edit** from the action menu.

   The *View or edit service report plan item* window opens. See *"To add a new report:" on page 245.*

To delete a report:

1. Select the report you want to delete, then click **Delete** from the action menu.

   The *Delete report* dialog box opens.

2. Click **Yes**.

   The report is deleted.

Closing Service Plans

Modifying an assigned closing service plan

Similar to a listing plan, an effective closing plan must provide a stable framework for your activities, while at the same time be flexible enough to meet scheduled changes. Once you assign a closing plan to a seller, Top Producer 7i makes it easy for you to modify this plan by adding, changing or deleting activities as required.

To add an activity to your closing plan:

1. In the *Closing details for [seller]* page, under the **Activities** tab, click **Add**.
2. In the *Add new activity* page, click the type of activity you want to add, then click **Next**.
3. Select who the activity is assigned to in the **Assigned to** drop-down list.
4. Set the activity date, time and duration, as appropriate, in the **Date**, **Start time** and **End time** fields.

   If you set an activity time, the activity will be displayed under **Appointments** in Today's business.
5. Optionally fill in a description of the activity in the **Description** field.
6. Click **Finish** to save the activity and return to the *Closing details for [seller]* page.

To mark an activity done in an assigned closing plan:

1. In the **Activities** tab, select the activity you want to mark done, then click **Mark done**.

   The *Mark done* dialog box opens.
2. Click **Yes**.

   The *Add activity to service report* dialog box opens.
3. Click **Yes** to add the activity to the service report.

   The *Add activity for [Closing address]* pop-up window opens.

4. Specify:

    - the activity's description by typing in the **Description** field, or click the list icon to select a preset item.
    - the activity's date by typing in the **Date** field, or clicking the calendar icon.
    - the time of the activity by typing in the **Time** field, or by using the spin buttons.
    - the total cost it took to perform the activity by typing a value in the **Cost** field.
    - any details for the activity by typing in the **Details** section, or click the **Details** link to select a preset item.

5. Click **OK**.

To change an activity in an assigned closing plan:

1. In the *Closing details for [seller]* page, under the **Activities** tab, highlight the activity you want to change, then click **View or edit**.

2. In the *View or edit [activity]* page, make the desired changes (for example, change the activity, add notes, mark the event done, etc.), then click **OK**.

To view your daily closing activities, point to **Schedule**, **Today's business** and click **Closing to-dos**.

To delete an activity from an assigned closing plan:

1. In the *Closing details for [seller]* page, under the **Activities** tab, highlight the activity you want to delete, then click **Delete**.

2. Click **Yes** in the *Delete activity* dialog box.

    If the activity has a child activity, the *Delete preceding activity* window is displayed.

3. Select one of the **After acceptance date**, **Before closing date**, or **After closing date** option buttons to schedule the dependent activity relative to the respective date.

4. Select the **After a different preceding activity occurs** option button to select a different preceding activity for the dependent activity. Select the new preceding activity from the **Select preceding activity** drop-down list box.

5. Click **OK** to save the changes.

For example, if you delete a parent activity and a child activity is scheduled for 5 days after the parent, you must choose how to reschedule the child activity. For example, selecting **After closing date** will schedule the child activity 5 days after the closing date.

Scheduling an activity for a fixed or a relative date

You can schedule an activity for a fixed date by selecting the **Fixed date** option, or schedule the activity for a date relative to the closing or acceptance date by selecting the **If the acceptance date changes auto-adjust** or **If the closing date changes auto-adjust** option. Setting the activity to one of the auto-adjust options will automatically change the activity date if you change either the acceptance or closing date.

Setting a reminder alarm

When adding or updating appointments and timed calls, you can set an email reminder alarm. Select the **Remind me** check box and choose how long before the activity time you want to be reminded from the drop-down list box. The reminder will be sent to your default email address, or you can enter a different address.

If the system detects a Palm device, then the Palm controls are available for you to set an alarm on your Palm device. Check the box to set an alarm on your Palm device. Use the spin buttons to set the time you want to be notified before the appointment. The system must be synchronized with the Palm device before the alarm is displayed.

Setting reminders and drop off

When adding or updating non-timed activities (to-dos, calls or email) you can fill in the **Remind me [X] days before (activity) date** field to set a preliminary reminder of the activity in Today's business. If you want the activity to drop off Today's business, enter a value in the **drop off [X] days after (activity) date** field.

Setting the activity's priority

When adding or updating to-dos and timed calls, set their **Priority** ("**1**" is highest, "**99**" is lowest).

Marking activities "done"

Once you complete an event, you can mark it done by clicking **Mark done** from the action menu. The activity will no longer appear in Today's business.

Linking the activity to another contact

To link an activity to one or more contacts other than the seller, click the **Contacts** link, select the contact(s) in the *Select contacts* page, then click **OK**. Note that the number of linked contacts appears in the **Contact** field in the *View or edit* *activity* page. These contacts can be accessed in the **Contacts** drop-down list.

Adding notes to an activity

When adding or updating an appointment, call or to-do, click **Notes** in the action menu to open the *Activity notes* page if you want to add notes.

Custom-creating your own closing plans

Depending on the nature of the plan you want to create, all methods have their advantages. If you are creating a specialized kind of plan, or a short-term plan, it is best for you to create your own plan from the ground up. However, you will find the *Closing services checklist* a very useful template to begin from if you are designing longer and more generic plans.

There are three ways that you can create your own Closing service plans:

- Start from scratch.
- Make a copy of the *Closing services checklist*, rename it and modify it.
- Make a copy of a closing plan you have created, rename it and modify it.

To create a new closing plan:

1. From the main menu, point to **Closings** and click **Closing plans**.
2. Click the **Create new** link (<u>NOT</u> the action menu option).
3. In the *Create new closing plan* pop-up window, name your plan in the **Closing plan name** field, then click **OK**.

Adding a new activity

4. From the action menu, click **Create new activity**.
5. In the *Add new activity to closing plan* page, select the activity type you want to add, then click **Next**.
6. Click the **Assign to** drop-down list box to select who the event will be assigned to.

Note: The assigned user must have access privileges to the database to perform the event.

7. The *Add new [activity] to closing plan* page has different functions depending on the event type you selected in step 5:

    - If you select **Email**, click **Select email template** to assign a template to the email.

8. Schedule the event for a date relative to the closing or acceptance dates by selecting one of the **After acceptance date, Before closing date** or **After closing date** option buttons. Schedule the event for a date relative to a parent activity by selecting the **After the preceding activity is completed** option button, then select the parent activity from the **Select preceding activity** drop-down list.

9. In the **Perform event [X] days [after/before] [date type]** field, fill in when you want the event to occur relative to the date that you selected in step 8.

    - If the event will require preparation, fill in the **Reminder [X] days before event** field to set how much advance notice you will receive in Today's business.
    - Set how many days you want the event to appear in Today's business by clicking the **Apply drop off to Today's business** check box, then filling in the **Drop off [X] days after [event] date** field.
    - You can also make sure the event will not land on a Saturday or Sunday by clicking **If event falls on a Saturday** or **If event falls on a Sunday** and selecting whether you want to move the event to **Next business day** or **Previous business day**.

10. You have now defined the event you want to add to the closing plan. To save the event in your plan and create further events, click **Enter next**, then repeat steps 5 - 9. To save the event and return to the *Plans setup - Closing plans* page, click **Finish**.

Modifying an activity

1. To edit an activity, highlight the activity in the *Plans setup - Closing plans* page, then click **View or edit activity** from the action menu.

    The *View or edit [activity type]* page opens.

2. Make the desired changes — for instance, change the event date — then click **OK**.

Note: If the activity has dependent activities, the **Drop off** controls will be unavailable.

Deleting an activity

1. To delete a plan activity, highlight the activity in the *Plans setup - Closing plans* page, then click **Delete activity** from the action menu.

   The *Delete activity* dialog box opens.

2. Click **Yes** to delete the activity.

   If the activity has a child activity, the *Delete preceding activity* window opens.

3. Select one of the following options buttons to schedule the child activity relative to the respective date:

   - **After acceptance date**
   - **Before closing date**
   - **After closing date**

4. Select the **After a different preceding activity occurs** option button, then select an activity from the **Select preceding activity** drop-down list to select a new parent activity.

5. Click **OK** to save the changes.

To use an existing closing plan as a template for creating a new closing plan:

In order to keep the existing plan intact for further use, be sure to make a copy of it, and then use the renamed copy as the template for your new plan.

1. Point to **Closings** and click **Closing plans**.

2. Select the plan you want to copy in the **Closing plan name** drop-down list, then click **Copy**.

   The *Copy closing plan* pop-up window opens.

3. Overwrite the copied plan's name with your new plan's name, then click **OK**.

4. Highlight the renamed copy in the **Closing plan name** drop-down list.

   The activities in the plan are listed.

5. To:

- add new events to the plan, click **Create new activity** from the action menu and follow the instructions outlined in *"Adding a new activity" on page 549*.
- modify an existing event in the plan, highlight the event, click **View or edit activity** and follow the instructions outlined in *"Modifying an activity" on page 550*.
- delete an existing event in the plan, highlight the event, then click **Delete activity** and follow the instructions outlined in *"Deleting an activity" on page 551*.

6. When you are finished creating the closing plan, click **Close**.

Viewing or printing closing plans

To view closing plans:

1. Point to **Setup**, then click **Plans setup**.
2. Under the **Closing plans** tab, select a closing plan.

   The activities in the selected plan are displayed in chronological order.
3. The **Sort chronologically** check-box is selected by default. If you sort by any other criterion (by clicking a heading), select this check box to return the list to chronological order.

To view or print a closing plan report:

1. Point to **Closings**, then click **Closing plans**.
2. Select a closing plan.
3. Click **View report** to view or print the activities in the plan.

   For more information, see *"Closing reports" on page 596*.

Working With Reports And Financials

In this chapter:

Income And Expense Tracker

The Income and Expense tracker provides you with an easy-to-use accounting tool for recording and organizing your real estate relevant earnings and expenditures. Use it to summarize financial information and run several types of reports for a specified period of time.

The Income and Expense tracker uses folders, categories, and item details to categorize and organize your data. If you have **Canada** set as your **Country** in the *Agent information* page, or work with Canadian accounts, you can set up the GST and PST tax rates. See *"GST Tax Calculation Setup" on page 586*.

Adding new income and expense folders

To add new income and expense folders:

1. Point to **Financial**, then click **Income and expenses**.

   The *Income and expense tracker* page is displayed. The **Folder** list displays the list of folders.

2. Sort the folders in ascending or descending order by clicking the arrow in the title bar.

3. To add a new folder, click **Add new** from the action menu to define your personal income or expense folders.

   The *Add new income and expense folder* pop-up window opens.

4. Enter the name for the new income or expense folder in the **New folder name** text box.

5. If you want to password-protect the new folder now, select the **I want to protect this folder with a password** check box. The window expands to reveal the following fields:

   - **Password** — enter a password for the folder (minimum of 4 characters).

- **Confirm password** — retype the password exactly as entered above.

Note: You can set a password for this folder later, by clicking **Set up password** from the action menu.

---

6. Click **OK**.

   The new folder appears in the **Folder** list.

7. Highlight the new folder in the list and click **View or edit** from the action menu to set up categories.

   For more information, see *"Viewing or editing income and expense categories" on page 562*.

Renaming income and expense folders

You can rename your existing income and expense folders.

To rename existing income and expense folders:

1. From the *Income and expense tracker* page, highlight a folder from the list.

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

   The *Rename [Folder name] folder* pop-up window opens.

3. Enter the new name for the selected folder in the **New folder name** text box.

4. Click **OK**.

Setting password protection for an income or expense folder

You can set up a password on your income and expense folders to ensure a level of security.

To password-protect existing income and expense folders:

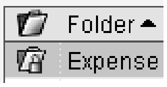
1. From the *Income and expense tracker* page, highlight a folder from the list.

2. Click **Set up password** from the action menu.

   The *Set up password for [folder name]* pop-up window opens.

3. Enter a password in the text box, then re-type it exactly in the **Confirm password** text box.

A small lock icon appears next to a password-protected folder.



4. Click **OK**.

   A small lock icon appears beside the folder in the list. You will be prompted for the password when you:
   - double-click on the locked folder
   - highlight a locked folder and click **View or edit** from the action menu
   - highlight a locked folder and click **Rename** from the action menu
   - highlight a locked folder and click **Report** from the action menu
   - highlight a locked folder and click **Delete** from the action menu

   In all the above instances, the *Enter password for [folder name]* pop-up dialog box opens.

5. Type the password in the text box and click **OK**.

   The action menu command now appears as **Change password**.

To change or remove the password on an income or expense folder:

You can change or remove the password on password-protected folders in the Income and expense tracker.

1. From the *Income and expense tracker* page, highlight a password-protected folder from the list. You can tell that a folder is password-protected by:

   - a small lock icon appears beside the folder in the list.
   - the action menu command is **Change password**.

2. Click **Change password** from the action menu.

   The *Change password for [folder name]* pop-up window opens.

3. In the **Old password** text box, type the password for the folder.

4. In the **New password** text box, type a new password or leave it blank if you do not want the folder to be password-protected.

5. In the **Confirm new password** text box, retype the new password exactly as you entered it in the previous text box, or leave it blank if you do not want the folder to be password-protected.

6. Click **OK**.

Note: If you have removed the password, the lock icon disappears from beside the folder and the action menu command changes to **Set up password**.

Running income and expense reports

You can generate four types of income and expense reports for the folder you are viewing for a specified date range. The reports can be previewed, saved as local files, or sent to the printer.

Note: You can only select one folder at a time.

To run income and expense reports:

1. From the *Income and expense tracker* page, highlight a folder for which you want to run a report.

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

   The *Income and expense report* page opens.

3. In the **Select date range** section, enter a **Start date** and an **End date** by typing in the fields; or click the calendar icons.

4. In the **Select report type** section, select one of the following report type options:

   - **Overview** — this report shows totals for each income category, each expense category, as well as the total income, total expenses, and net income for a selected folder within a specified date range.
   - **Summary** — this report shows more detail than the Overview report. It summarizes the total income, total expenses, and net income for each of the sub-categories within the income and expense categories; and the total income, total expenses, and net income overall for a specified date range.
   - **Detailed** — this report shows all the items in each category and sub-category, as well as the total income, total expenses, and net income for each category in the selected folder.
   - **Month to month net income** — this report shows the income, expenses, and net income for each

month in the selected date range, as well as the overall total income, total expenses, and net income.

5. Click **View report** from the control menu.

   A new browser window opens, from which you can send the report to the printer; or download the report as a.pdf,.xls or. csv file.

   For more information on reports, see *"Running Reports" on page 591*, and *"Downloading reports" on page 590*.

Deleting income and expense folders

You can permanently remove an income or expense folder and all its contents from the Income and expense tracker.

To delete existing income and expense folders:

1. From the *Income and expense tracker* page, highlight a folder from the list.

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

   The *Delete [Folder name] folder* dialog box opens.

3. Click **Yes** to confirm deletion of the folder and all its contents.

Viewing or editing income and expense folders

The view or edit function lets you manage the categories in the selected income or expense folder. You can also specify how you want the summary financial information displayed.

Note: The total of the data is displayed in the bottom right corner of the page. If you are using the Canadian version of the product, there are additional GST totals displayed.

To view an existing income or expense folder:

1. From the *Income and expense tracker* page, highlight a folder in the list.

2. Click **View or edit** from the action menu.

   The *[Folder name]* page opens.

3. Click the **Income and expense view** drop-down list box and select one of the following views:

   - **Show month/year to date** — this is the default view. Select this view to display the month-to-date and the year-to-date totals of all income and expense categories.

The month-to-date amounts are calculated on all item entries entered from the first date of the current month to the current date (inclusive). The year-to-date amounts are calculated on all item entries entered from the first date of the current year to the current date (inclusive). The **Month** and **Year** drop-down lists are not available, but show the current information.

- **Show monthly total** — select this view to display the total amount of all income and expense categories, calculated on all item entries entered during the specified month.
- **Show yearly total** — select this view to display the total amount of all income and expense categories, calculated on all item entries entered during the specified year.
- **Show total between** — select this view to display the total amount of all income and expense categories, calculated on all item entries entered during the specified date range.

4. Depending on which of the views you selected in step 3, the corresponding date range controls are available:

   - When you select **Show monthly total** from the drop-down list, the **Month** and **Year** fields are available. Specify the month and the year you want the total to reflect, then click the **Display** link.
   - When you select **Show yearly total** from the drop-down list, the **Year** field is available. Specify the year you want the total to reflect, then click the **Display** link.
   - When you select **Show total between** from the drop-down list, the **Start date** and **End date** fields are available. Specify the date range by typing in the field, or click the calendar icon. Click the **Display** link.

5. You will need to click **Add new** from the action menu to define a new income or expense category types.

   See *"Adding new income and expense categories" on page 560*.

6. Click **Close**.

Adding new income and expense categories

You can add categories in each of your income and expense folders to further organize your entries.

To add a new income or expense category to the selected folder:

1. From the *Income and expense tracker* page, highlight a folder for which you want to add categories.

2. Click **View or edit** from the action menu to display the *[Folder name]* page.

   The page is divided into two grids: the top section shows a list of **Income categories**; and the bottom section shows a list of **Expense categories**.

   The bottom of the page displays the summary information for the selected folder. These types of totals displayed can be set up in *"Renaming income and expense folders" on page 555*.

3. Click **Add new** from the action menu.

   The *Add new category* pop-up window opens.

4. Type a name for the new category in the **New category name** text box.

5. Select the category type option button: **Income** or **Expense**.

6. Click **OK**.

   The category appears in the appropriate list box on the *[Folder name]* page, with a running **Month-to-date** and **Year-to-date** total.

Renaming existing income and expense categories

You can rename a category you select from either the income or expense section of the selected folder page.

To rename an existing income or expense category in a selected folder:

1. From the *[Folder name]* page, highlight an item from either the **Income categories** or **Expense categories** list box.
2. Click **Rename** from the action menu.

   The *Rename [Category name] category* pop-up window opens.
3. Enter the new name for the selected category in the **New category name** text box.
4. Click **OK**.

Running income and expense categories reports

You can generate four types of income and expense reports, for the folder you are viewing. The reports can be previewed, saved as local files, or sent to the printer.

Note: You can only select one folder at a time.

See *"Running income and expense reports" on page 557*.

Deleting income and expense categories

You can permanently remove a category and all its entries from either the income or expense section of the selected folder page.

To delete an existing income or expense category from a selected folder:

1. From the *[Folder name]* page, highlight an item from either the **Income categories** or **Expense categories** list box.
2. Click **Delete** from the action menu.

   The *Delete [Category name] category* dialog box opens.
3. Click **Yes** to confirm deletion of the category and all its contents.

Viewing or editing income and expense categories

The view or edit function lets you manage the sub-categories and individual entries in the selected income or expense category. You can also specify how you want the summary financial information displayed.

> **Note:** The total of the data is displayed in the bottom right corner of the page. If you are using the Canadian version of the product, the total will include GST tax amounts.

To view an existing income or expense category:

1. From the *Income and expense tracker* page, highlight a folder in the list.
2. Click **View or edit** from the action menu to display the *[Folder name]* page.
3. Highlight a category in either the **Income categories** or **Expense categories** section of the page.
4. Click **View or edit** from the action menu.

   The *[Category name] in [Folder name]* page opens.
5. Click the **[Income/Expense] view** drop-down list and select one of the following views:
   - **Show month to date** — Select this view to display the total amount of all entries in the specified category, calculated on all item entries made from the first date of the current month to the current date (inclusive). The **Month** and **Year** fields are not available, but show the current information.
   - **Show monthly total** — Select this view to display the total amount of all entries in the specified category, calculated on all item entries made during the specified month.
   - **Show yearly total** — Select this view to display the total amount of all entries in the specified category, calculated on all item entries made during the specified year.
   - **Show total between** — Select this view to display the total amount of all entries in the specified category, calculated on all item entries made during the specified date range.

6. Depending on which of the views you selected in step 5, the corresponding date range controls are available:

    - When you select **Show monthly total** from the drop-down list, the **Month** and **Year** fields are available. Specify the month and the year you want the total to reflect, then click the **Display** link.
    - When you select **Show yearly total** from the drop-down list, the **Year** field is available. Specify the year you want the total to reflect, then click the **Display** link.
    - When you select **Show total between** from the drop-down list, the **Start date** and **End date** fields are available. Specify the date range by typing in the field, or click the calendar icon. Click the **Display** link.

7. Click **Add new** from the action menu to enter a new income or expense entry.

    See *"Adding new income and expense entries" on page 563*.

8. Click **Close**.

Adding new income and expense entries

You can add details of a new entry within a selected income or expense category.

To add a new income or expense entry to a selected category:

1. From the *Income and expense tracker* page, highlight a folder from the list.

2. Click **View or edit** from the action menu.

    The *[Folder name]* page opens.

3. Highlight a category in which you want to add specific entries.

4. Click **View or edit** from the action menu.

    The *[Category name] in [Folder name]* page opens.

5. Click **Add new** from the action menu.

    The *Add new [Income/Expense]* pop-up window opens.

6. Complete the following details:

    - **Date** — type the date the income or expense item was created (MM/DD/YYYY); or click the calendar icon to select from a calendar. The default is today's date.
    - **Sub category** — type the sub-category you want the income or expense item to be included in; or click the list icon and choose a preset item.
    - **Description** — type a description of the income or expense item in the text box.
    - **Amount** — type the amount of the income or expense item in the text box.

Note: If you are using the Canadian version, you will have to set up the GST tax calculation. Click the **GST** link to do this, (see *"Using the GST calculation link" on page 565*).

    - **Paid by** — type the method by which the income or expense item was paid (for example, cash, check, or credit card); or click the list icon and choose a preset item.
    - **Invoice number** — type an invoice number for the income or expense item in the text box, if necessary.
    - **Check number** — type the check number for the income or expense item in the text box, if necessary.

7. Click **OK**; or click **Enter next** to add another new item.

Viewing or editing existing income and expense entries

You can view or edit the details of a selected entry within a selected income or expense category.

To view or edit an existing income or expense entry in a selected category:

1. From the *[Category name] in [Folder name]* page, highlight an entry from the list.

2. Click **View or edit** from the action menu.

    The *View or edit [Income/Expense]* pop-up window opens.

3. View or edit the following details:

- **Date** — view or edit the date the income or expense item was created (MM/DD/YYYY); or click the calendar icon to select from a calendar. The default is today's date.
- **Sub category** — view or edit the sub-category you want the income or expense item to be included in; or click the list icon and choose a pre-set item.
- **Description** — view or edit a description of the income or expense item in the text box.
- **Amount** — view or edit the amount of the income or expense item in the text box.

Note: If you are using the Canadian version, you will have to set up the GST tax calculation. Click the **GST** link to do this, (see *"Using the GST calculation link" on page 565*).

- **Paid by** — view or edit the method by which the income or expense item was paid (for example, cash, check, or credit card); or click the list icon and choose a preset item.
- **Invoice number** — view or edit an invoice number for the income or expense item in the text box, if necessary.
- **Check number** — view or edit the check number for the income or expense item in the text box, if necessary.

4. Click **OK**.

Using the GST calculation link

The GST calculation feature is only applicable to the Canadian version of Top Producer 7i. It enables you to select how the Goods and Services Tax (GST) and Provincial Sales Tax (PST) amounts are calculated on the income and expense entry you are working on.

To use the GST link for the Canadian version only:

1. When adding or editing individual income or expense entries, the *Add new [Income/Expense]* or the *View or edit [Income/Expense]* pop-up window has an additional field called **GST**. Above it, click the **GST** link to display the *GST calculation* pop-up window.

2. In the **GST and PST options** section, determine how the GST and PST values will be calculated on the entry amount (the $in the **Amount** field):

   - **Amount includes GST and PST** — if you select this option, both the GST and PST amounts are included in the entry amount. The **GST** text box displays how much the GST was using this calculation method.
   - **Amount includes GST only** — if you select this option, only the GST amount is included with the amount shown in the **Amount** text box. The **GST** text box displays how much the GST was using this calculation method.
   - **Amount includes PST only** — if you select this option, only the PST amount is included with the amount shown in the **Amount** text box. The **GST** text box will be empty.
   - **Amount is before GST and PST** — if you select this option, both GST and PST amounts are calculated and automatically added on top of the amount shown in the **Amount** text box. The **GST** text box displays how much the GST was using this calculation method.

3. The **GST and PST rates** section is view-only and shows you the current tax rates you've set up.

   To change these, see *"GST Tax Calculation Setup" on page 586*.

4. Click **OK**.

Deleting existing income and expense entries

You can delete an existing income or expense entry from a selected category.

To delete an existing income and expense entry from a selected category:

1. From the *[Category name] in [Folder name]* page, highlight an entry from the list.

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

   The *Delete [Income/Expense]* dialog box opens.

3. Click **Yes** to confirm deletion of the selected item from the category.

Buyer Net Sheets

The buyer net sheet feature lets you prepare a presentation-quality report that itemizes a buyer's costs and calculates the approximate cash necessary to close the sale.

You can create a default list of closing costs and prepaid expenses that can be added automatically to every buyer net sheet you create. When a new buyer net sheet is created, these default cost items can be edited or deleted if not applicable to the transaction.

Viewing a summary list

The *Buyer net sheets* page displays all of the buyer net sheets that have been created, and lets you manage them. You can also use this page to define default buyer closing costs, define default prepaid expense entries, and generate a report.

To view a summary list of all existing buyer net sheets:

1. From the main menu, point to **Financial**, then click **Buyer net sheet**.

   The *Buyer net sheets* page opens.

2. Click the small arrow next to the **Contact** label to sort the sheets in ascending or descending order.

3. Use the action menu items to add, view, edit, and delete net sheets.

4. Click **Close**.

Creating a new buyer net sheet

The *Add new buyer net sheet wizard* lets you select a specific property, apply the default closing cost and prepaid expense entries, and enter the details.

To create a new buyer net sheet:

1. From the *Buyer net sheets* page, click **Add new** from the action menu.

   The *Add new buyer net sheet — Select property* page opens.

2. Use the search function to find and select the property for which you want to create the buyer net sheet.

    - choose one of the **Search contact by** options: **Name**, **Address**, **Contact type**, or **All contacts**, then enter the information in the relevant text boxes.
    - click the **Start search** link.

3. From the **Contact name** list, highlight a record from the list.

    - use the action menu items to view or edit the contact, or to add a new contact.

Use the action menu items to view or edit the contact, or to add a new contact. For more information, see *"Viewing And Modifying Contacts" on page 132*.

4. Select the **Use default closing costs and prepaid expenses** check box in the bottom left corner of the page, if you want to apply the default closing cost and prepaid expense entries to this buyer net sheet.

5. Click **Next**.

    The *Add new buyer net sheet — Enter details* page opens.

6. Based on the contact record, the **Prepared for**, **Prepared by** and **Address** text boxes are automatically filled in with the buyer's name and address and the agent's name. Enter the following information:

    - **Purchase price** — Enter the purchase price of the property.
    - **Date** — By default, the current date is displayed. Type the creation date of this buyer net sheet; or use the calendar icon.
    - **Mortgage amount** — Enter the value of the mortgage amount.
    - **Interest rate** — Enter the interest rate percentage.
    - **Mortgage type** — Enter the type of mortgage; or click the list icon to select a preset item.

7. Use the action menu items to add a closing cost or prepaid expense, apply default entries, view or edit the closing cost and prepaid expense entry items, and remove a selected entry item.

The **Closing costs** list box shows all the closing costs of the buyer net sheet. The **Prepaid expenses** list box shows all the prepaid expenses of the buyer net sheet.

Note: If the **Use default closing costs and prepaid expenses** check box is selected on the first page of the wizard, these two grids are filled in automatically.

8. Click **Finish**.

   You are returned to the *Buyer net sheets* page, where the new buyer net sheet now appears in the list.

Defining default closing costs and prepaid expenses

Use the *Buyer net sheet defaults* page (when opened from the **Defaults** command) to pre-define default closing cost and prepaid expense entries, which can then be applied to selected buyer net sheets.

To define a closing cost or prepaid expense to be applied as a default entry:

1. From the *Buyer net sheets* page, click **Defaults** from the action menu.

   The *Buyer net sheet defaults* page opens.

   The **Closing costs** list displays the **Description**, **Percentage** and **Amount** columns:

2. Click the arrow next to the **Description** label to sort the items in ascending or descending order.
3. The **Prepaid expenses** list displays the **Description** and **Amount** columns. Click the arrow next to the **Description** label to sort the items in ascending or descending order.
4. Use the action menu items to add new default closing cost or prepaid expense entries, view or edit existing entries, or delete unwanted entries.
5. Click **Close**.

Adding default closing costs

You can add a new predefined closing cost entry to be applied later to a selected buyer net sheet.

To add a default closing cost entry:

1. From the *Buyer net sheet defaults* page, click **Add default closing cost** from the action menu.

   The *Add default closing cost* pop-up window opens.

2. Complete the following text boxes:

   - **Description** — Enter a description of the closing cost entry.
   - **Amount** — Enter an amount for the closing cost entry.

   Note: If you enter a percentage amount in the **Percentage** text box, the **Amount** text box will be cleared of any values.

   - **Percentage** — Enter a percentage amount in the text box. The option buttons in step 3 become available.

3. Select one of the following option buttons to be used in conjunction with the **Percentage** text box:

   - **Base percentage on purchase price** — select this option to calculate the amount of the default closing cost entry on a percentage of the purchase price.
   - **Base percentage on mortgage amount** — select this option to calculate the amount of the default closing cost entry on a percentage of the mortgage amount.

4. Select the **Include on report** check box to show this default closing cost entry on the report, when applied to a selected buyer net sheet.

5. Click **OK**; or **Enter next** to add another default closing cost entry.

Adding default prepaid expenses

You can add a new predefined prepaid expense entry to be applied later to a selected buyer net sheet.

To add a default prepaid expense entry:

1. From the *Buyer net sheet defaults* page, click **Add default prepaid expense** from the action menu.

The *Add default prepaid expense* pop-up window opens.

2. Complete the following text boxes:

   - **Description** — Enter a description of the prepaid expense entry.
   - **Amount** — Enter an amount for the prepaid expense entry.

3. Select the **Include on report** check box to show this default prepaid expense entry on the report, when applied to a selected buyer net sheet.

4. Click **OK**; or **Enter next** to add another prepaid expense entry.

Viewing or editing default closing costs or prepaid expenses

You can view or edit a predefined closing cost or prepaid expense entry.

To view or edit a default closing cost/prepaid expense entry:

1. From the *Buyer net sheet defaults* page, highlight either a closing cost entry or a prepaid expense entry in the corresponding list.

2. Click **View or edit** from the action menu.

   The *View or edit default [closing cost/prepaid expense]* pop-up window opens.

3. Make any modifications as necessary.

   For more information on the specific fields, see *“Adding default closing costs” on page 569* and *“Adding default prepaid expenses” on page 570*.

4. Click **OK**.

Deleting default entries

You can delete selected predefined closing cost/prepaid expense entries.

To delete a default closing cost/prepaid expense entry:

1. From the *Buyer net sheet defaults* page, highlight either a closing cost entry or a prepaid expense entry in the corresponding list.

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

3. When the *Delete default [closing cost/prepaid expense]* dialog box is displayed, click **Yes** to confirm the deletion.

Viewing or editing a buyer net sheet

The *View or edit buyer net sheet* looks like the second page of the *Add new buyer net sheet wizard*. It displays the details of the selected buyer net sheet and lets you modify the contents. For more information, refer to *"Creating a new buyer net sheet" on page 567*.

To view or edit a selected buyer net sheet:

1. From the *Buyer net sheets* page, highlight a contact from the list, then click **View or edit** from the action menu.

   The *View or edit buyer net sheet* page opens.

2. Make modifications to the fields, if required:

   - **Prepared for** — view or edit the buyer's name.
   - **Purchase price** — view or edit the purchase price of the property.
   - **Date** — By default, the current date is displayed. View or edit the creation date of this buyer net sheet; or use the calendar icon.
   - **Prepared by** — view or edit the agent who prepared the selected buyer net sheet.
   - **Address** — view or edit the buyer's property address.
   - **Mortgage amount** — view or edit the value of the mortgage amount.
   - **Interest rate** — view or edit the interest rate percentage.
   - **Mortgage type** — view or edit the type of mortgage; or click the list icon to select a preset item.

3. Use the action menu items to add a closing cost, a prepaid expense, generate a report, apply default entries, and remove a selected entry item. You can also edit the items listed in the **Closing costs** or **Prepaid expenses** grids.

   The **Closing costs** list box shows all the closing costs of the buyer net sheet. The **Prepaid expenses** list box shows all the prepaid expenses of the buyer net sheet.

Note: If the **Use default closing costs and prepaid expense** check box was selected when the net sheet was created, these two grids are filled in automatically, (see *"Creating a new buyer net sheet" on page 567*).

4. Click **Close**.

Adding a closing cost

From the *View or edit buyer net sheet* page, use the action menu item to create new closing costs.

To add a new closing cost:

1. From the *View or edit buyer net sheet* page, click **Add closing cost** from the action menu.

   The *Add closing cost* pop-up window opens.

Note: You can also access the **Add closing cost** action menu item from the *Add new buyer net sheet* page, (see *"Creating a new buyer net sheet" on page 567*).

2. Complete the following:

   - **Description** — Enter a description of the closing cost; or click the list icon to select a preset item.
   - **Amount** — Enter an amount for the closing cost.

Note: If you enter a percentage amount in the **Percentage** text box, the **Amount** text box will be cleared of any values.

   - **Percentage** — Enter a percentage amount in the text box. The option buttons in step 3 become available.

3. Select one of the following option buttons to be used in conjunction with the **Percentage** text box:

   - **Base percentage on purchase price** — select this option to calculate the amount of the closing cost entry on a percentage of the purchase price.
   - **Base percentage on mortgage amount** — select this option to calculate the amount of the closing cost entry on a percentage of the mortgage amount.

4. Select the **Include on report** check box to show this closing cost entry on the buyer net sheet report.

   For information on generating a buyer net sheet report, see *"Running a buyer net sheet report" on page 576*.

5. Click **OK**; or **Enter next** to add another closing cost.

Adding a prepaid expense

From the *View or edit buyer net sheet* page, use the action menu item to create new prepaid expenses.

To add a new prepaid expense item:

1. From the *View or edit buyer net sheet* page, click **Add prepaid expense** from the action menu.

   The *Add prepaid expense* pop-up window opens.

Note: You can also access the **Add prepaid expense** action menu item from the *Add new buyer net sheet* page, (see *"Creating a new buyer net sheet" on page 567*).

2. Complete the following:

   - **Description** — Enter a description of the prepaid expense; or click the list icon to select a preset item.
   - **Amount** — Enter an amount for the prepaid expense.

3. Select the **Include on report** check box to show this prepaid expense entry on the buyer net sheet report.

   For information on generating a buyer net sheet report, see *"Running a buyer net sheet report" on page 576*.

4. Click **OK**; or **Enter next** to add another prepaid expense.

Applying default closing entries

Use the *Buyer net sheet defaults* page (when opened from the **Apply defaults** command) to apply the pre-defined default closing cost and prepaid expense entries to the selected buyer net sheet.

To apply default closing entries from the View or edit buyer net sheet page:

1. From the *Buyer net sheets* page, highlight the contact from the list, whose buyer net sheet you want to work with.

2. Click **View or edit** from the action menu.

   The *View or edit buyer net sheet* page opens.

   Note: You can also access the **Apply defaults** action menu item from the *Add new buyer net sheet* page, (see *"Creating a new buyer net sheet" on page 567*).

3. Click **Apply defaults** from the action menu.

   The *Buyer net sheet defaults* page opens.

4. The *Buyer net sheets default* page has two grids; **Closing costs** and **Prepaid expenses**. Each grid displays all of the default entries you have defined, showing the description, percentage and amount values.

   - in the **Select** column, click the check box of the entries that you want to apply to the selected buyer net sheet. Use the **Select all** link to highlight the entire list.
   - click the arrow next to the **Description** label to sort the items in ascending or descending order.

5. Use the action menu items to add new default closing cost or prepaid expense entries, view or edit existing entries, or delete unwanted entries.

6. Click **Apply**. The pre-defined entr(ies) you selected are applied to the selected buyer net sheet.

   You are returned to the *View or edit buyer net sheet* page.

Viewing or editing closing cost and prepaid expense entries

You can view or edit a selected closing cost/prepaid expense entry while editing a selected buyer net sheet.

To view or edit a selected closing cost/prepaid expense entry:

1. From the *View or edit buyer net sheet* page, highlight either a closing cost entry or a prepaid expense entry.
2. Click **View or edit** from the action menu.

   The *View or edit closing cost/prepaid expense* pop-up window opens.
3. Edit the fields as required.
4. Click **OK**.

Deleting closing cost and prepaid expense entries

You can delete a selected closing cost/prepaid expense entry while editing a selected buyer net sheet.

To delete a selected closing cost/prepaid expense entry:

1. From the *View or edit buyer net sheet* page, highlight either a closing cost entry or a prepaid expense entry.
2. Click **Delete** from the action menu.
3. When the *Delete closing cost/prepaid expense* dialog box is displayed, click **Yes** to delete the selected entry.

Running a buyer net sheet report

You can run a buyer net sheet report for a selected contact from two locations, (see *"Running Reports" on page 591*).

To access the reporting feature in a selected buyer net sheet:

1. From the *Buyer net sheets* page, highlight a contact in the list.
2. Click **Report** from the action menu; or while editing the selected buyer net sheet from the *View or edit buyer net sheet* page, click **Report** from the action menu.

   The buyer net sheet report is displayed in a new browser window.

3. Use the browser controls to print, change the view, and move through multiple pages of the report.

Deleting a buyer net sheet

You can remove an existing buyer net sheet for a selected contact.

To delete an existing buyer net sheet:

1. From the *Buyer net sheets* page, highlight a contact from the list.
2. Click **Delete** from the action menu.
3. When the *Delete buyer net sheet* dialog box is displayed, click **Yes** to confirm the deletion.

Seller Net Sheets

The seller net sheet feature lets you prepare a presentation quality report that itemizes a seller's expenses and calculates an approximate cash payout or equity amount.

You can create a default list of selling expense items that can be added automatically to every seller net sheet you create. When a new seller net sheet is created, these default items may be edited or deleted if not applicable to the particular transaction.

Viewing a summary list

The *Seller net sheets* page displays all of the seller net sheets that have been created, and lets you manage them. You can also use this page to define default selling expenses and generate a report.

To view a summary list of all existing seller net sheets:

1. From the main menu, point to **Financial**, then click **Seller net sheet**.
2. Click the small arrow next to the **Contact** label to sort the sheets in ascending or descending order.
3. Use the action menu items to add, view, edit, and delete net sheets. As well, you can define seller selling expense default entries and generate a report.
4. Click **Close**.

Creating a new seller net sheet

The *Add new seller net sheet wizard* lets you select a specific property, apply the default selling expense entries, and enter the details.

To create a new seller net sheet:

1. From the *Seller net sheets* page, highlight a contact from the list, then click **Add new** from the action menu.

   The *Add new seller net sheet — Select property* page opens.

2. Use the search function to find and select the property for which you want to create the seller net sheet.

    - choose one of the **Search contact by** options: **Name**, **Address**, **Contact type**, or **All contacts**, then enter the information in the relevant text boxes.
    - click the **Start search** link.

3. From the **Contact name** list, highlight a record.

4. Select the **Use default selling expenses** check box in the bottom left corner of the page, if you want to apply the default selling expense entries to this seller net sheet.

5. Use the action menu items to view or edit the contact, or to add a new contact.

6. Click **Next**.

    The *Add new seller net sheet — Enter details* page opens. Based on the contact record, the **Prepared for**, **Prepared by** and **Address** text boxes are automatically filled in with the seller's name and address, and the agent's name.

7. Enter the following information:

    - **Selling price** — Enter the selling price of the property.
    - **Date** — By default, the current date is displayed. Type the creation date of this seller net sheet; or use the calendar icon.

8. Use the action menu items to add a selling expense, apply default entries, view or edit the default selling expense entries, or remove unwanted entries.

    The **Selling expenses** list box shows all the selling expenses of the seller net sheet.

Note: If the **Use default selling expenses** check box is selected on the first page of the wizard, this grid is filled in automatically.

9. Click **Finish**.

You are returned to the *Seller net sheets* page, where the new seller net sheet now appears in the list.

Defining default selling expenses

Use the *Seller net sheet defaults* page (when opened from the **Defaults** command) to pre-define default selling expense entries, which can then be applied to selected seller net sheets.

To define a selling expense to be applied as a default entry:

1. From the *Seller net sheets* page, click **Defaults** from the action menu.

   The *Seller net sheet defaults* page opens.

   The **Selling expenses** list displays the **Description**, **Percentage** and **Amount** columns.

2. Click the arrow next to the **Description** label to sort the items in ascending or descending order.

3. Use the action menu items to add new default selling expenses, view or edit existing entries, or delete unwanted entries.

4. Click **Close**.

Adding default selling expenses

You can add a new predefined selling expense entry to be applied later to a selected seller net sheet.

To add a default selling expense entry:

1. From the *Seller net sheet defaults* page, click **Add default selling expense** from the action menu.

   The *Add default selling expense* pop-up window opens.

2. Complete the following text boxes:

   - **Description** — Enter a description of the selling expense entry.
   - **Amount** — Enter an amount for the selling expense entry.

   Note: If you enter a percentage amount in the **Percentage** text box, the **Amount** text box will be cleared of any values.

   - **Percentage of selling price** — Enter a percentage amount in the text box.

3. Select the **Include on report** check box to show this default selling expense entry on the report, when applied to a selected seller net sheet.

4. Click **OK**; or **Enter next** to add another default selling expense entry.

Viewing or editing default selling expenses

You can view or edit a predefined selling expense entry.

To view or edit a default selling expense entry:

1. From the *Seller net sheet defaults* page, highlight a selling expense entry in the list.

2. Click **View or edit** from the action menu.

   The *View or edit default selling expense* pop-up window opens.

3. Make any modifications as necessary.

   For more information on the specific fields, see *"Adding default selling expenses" on page 580*.

4. Click **OK**.

Deleting default entries

You can delete selected predefined selling expense entries.

To delete a default selling expense entry:

1. From the *Seller net sheet defaults* page, highlight a selling expense entry in the list.

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

3. When the *Delete default selling expense* dialog box is displayed, click **Yes** to confirm the deletion.

Viewing or editing a seller net sheet

The *View or edit seller net sheet* page looks like the second page of the *Add new seller net sheet wizard*. It displays the details of the selected seller net sheet and lets you modify the contents. For more information, see *"Creating a new seller net sheet" on page 578*.

To view or edit a selected seller net sheet:

1. From the *Seller net sheets* page, highlight a contact from the list, then click **View or edit** from the action menu.

   The *View or edit seller net sheet* page opens.

2. Make modifications to the fields, if required:

   - **Prepared for** — view or edit the seller's name.
   - **Selling price** — view or edit the selling price of the property.
   - **Date** — By default, the current date is displayed. View or edit the creation date of this seller net sheet; or click the calendar icon.
   - **Address** — view or edit the seller's property address.
   - **Prepared by** — view or edit the name of the agent who prepared the selected seller net sheet.

3. Use the action menu items to add a selling expense, generate a report, apply default entries, and remove a selected entry item. You can also edit the items listed in the **Selling expenses** grid.

   The **Selling expenses** list box shows all the selling expense entries of the seller net sheet.

   Note: If the **Use default selling expenses** check box was selected when you created the seller net sheet, this grid is filled in automatically, (see *"Creating a new seller net sheet" on page 578*).

4. Click **Close**.

Adding a selling expense

From the *View or edit seller net sheet* page, use the action menu item to create new selling expenses.

To add a new selling expense:

1. From the *View or edit seller net sheet* page, click **Add selling expense** from the action menu.

   The *Add selling expense* pop-up window opens.

Note: You can also access the **Add selling expense** action menu item from the *Add new seller net sheet* page, (see *"Creating a new seller net sheet" on page 578*).

2. Complete the following:
   - **Description** — Enter a description of the selling expense; or click the list icon to select a preset item.
   - **Amount** — Enter an amount for the selling expense.
   - **Percentage of selling price** — Enter a percentage of the selling price.
3. Select the **Include on report** check box to show this default selling expense entry on the report, when applied to a selected seller net sheet.
4. Click **OK**; or **Enter next** to add another selling expense entry.

Applying default selling expenses

Use the *Seller net sheet defaults* page (when opened from the **Apply defaults** command) to apply the pre-defined default selling expense entries to the selected seller net sheet.

To apply default selling expense entries from the View or edit seller net sheet page:

1. From the *Seller net sheets* page, highlight the contact from the list, whose seller net sheet you want to work with.
2. Click **View or edit** from the action menu.

   The *View or edit seller net sheet* page opens.
3. Click **Apply defaults** from the action menu.

   The *Seller net sheet defaults* page opens.
4. The **Selling expenses** list displays the **Select**, **Description**, **Percentage** and **Amount** columns:
   - select the check box in the **Select** column to apply the entry to the selected seller net sheet.
   - click the arrow next to the **Description** label to sort the items in ascending or descending order.

5. Use the action menu items to add new default selling expense entries, view or edit existing entries, or delete unwanted entries.

6. Click **Apply** from the control menu.

   The pre-defined entr(ies) you selected are applied to the selected seller net sheet. You are returned to the *View or edit seller net sheet* page.

Viewing or editing selling expense entries

You can view or edit a selected selling expense entry while editing a selected seller net sheet.

To view or edit a selected selling expense entry:

1. From the *View or edit seller net sheet* page, highlight a selling expense entry.

2. Click **View or edit** from the action menu.

   The *View or edit selling expense* pop-up window opens.

3. Edit the fields as required.

4. Click **OK**.

Deleting selling expense entries

You can delete a selected selling expense entry while editing a selected seller net sheet.

To delete a selected selling expense entry:

1. From the *View or edit seller net sheet* page, highlight a selling expense entry.

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

3. When the *Delete selling expense* dialog box is displayed, click **Yes** to confirm deletion of the selected entry.

Running a seller net sheet report

You can run a seller net sheet report for a selected contact from two locations, (see *"Running Reports" on page 591*).

To access the reporting feature in a selected seller net sheet:

1. From the *Seller net sheets* page, highlight a contact in the list.

2. Click **Report** from the action menu; or while editing the selected seller net sheet from the *View or edit seller net sheet* page, click **Report** from the action menu.

   The seller net sheet report is displayed in a new browser window.

3. Use the browser controls to print, change the view, and move through multiple pages of the report.

4. Click the drop-down list at the bottom of the page to download the report in one of three formats. For more information, see *"Downloading reports" on page 590*.

Deleting a seller net sheet

You can remove an existing seller net sheet for a selected contact.

To delete an existing seller net sheet:

1. From the *Seller net sheets* summary page, highlight an item from the list.

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

3. When the *Delete seller net sheet* dialog box is displayed, click **Yes** to confirm the deletion.

GST Tax Calculation Setup

The tax calculation feature is for the Canadian users only and becomes visible in the program:

- during initial sign up.
- when the **Country** is set to **Canada** on the *Agent information* page during Agent setup. For more information, see *“Agent Setup” on page 35*.

This feature lets you to set up the tax calculation options and rates that the program will use to automatically calculate the Goods and Services Tax (GST) and the Provincial Sales Tax (PST) amounts incurred on income and expense activities.

1. From the main menu, point to **Financial**, then click **Tax calculation setup**.

   The *Tax calculation setup* page opens.

2. In the **GST and PST options** section, select one of the following options:

   - **Amount includes GST and PST** — this is the default setting. Income and expense entries will be calculated to include both the GST and PST.
   - **Amount includes GST only** — if you select this option, income and expense entries will be calculated to include only the GST.
   - **Amount includes PST only** — if you select this option, income and expense entries will be calculated to include only the PST.
   - **Amount is before GST and PST** — if you select this option, both GST and PST amounts are calculated and automatically added on top of the income and expense entries.

3. In the **GST and PST rates** section, use the spin buttons to set up the following:

   - **Current GST percent rate** — the default setting is 7.00 percent. Enter the currently applicable GST rate.
   - **Current PST percent rate** — the default setting is 0.00 percent. Enter the currently applicable PST rate for your province.

4. Select the **PST is calculated on amount + GST** check box to calculate the PST only after the GST has been added to the entry.
5. Click **OK**.

Viewing And Printing Reports

You can generate reports from the following areas in Top Producer 7i:

- Today's business
- Schedule
- Contacts, Search, Leads, Referrals
- Listings
- Closings
- Income and Expenses
- Buyer and Seller net sheets
- Plans setup

Some reports have various options that need to be set up before you can view or print them. You will be prompted with the *Report options* page, if this is the case.

Viewing reports

1. To generate a report, highlight one or more records from the list (or proceed straight from the page you are viewing).

2. Click **View report** from the action menu.

   Note: If you are viewing reports from the *Buyer or Seller net sheets* pages, the action menu item is **Report**.

   In many cases the *Report options* page is displayed.

3. Set up any options, if required. For example, you may be required to select a summary report or a detailed report.

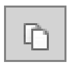
4. Click **View report** from the control menu at the bottom of the page.

   The report is displayed in a new browser window.

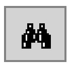
5. Use the browser toolbar buttons to manage your report, as follows:

Click the **Table of Contents** icon to display a **Contents** column on the left side of the page. Click the **X** in the upper right corner of the column to close the **Contents** view.

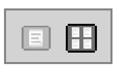
Click the **Print** icon to display the *Print* pop-up window, enabling you to specify your printer settings.



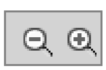
Click the **Copy** icon to make a copy of the report so that it can be pasted into an email or document.



Click the **Find** icon to display the *Find* pop-up window. Type the text you want to search for in the **Find what** field. Select the **Match whole word only** or **Match case** check box(es) if applicable. Specify the search direction by choosing the **Up** or **Down** option. Click **Find Next** to begin the search.



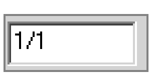
Click the **Single Page / Multiple Pages** icons to display the report in a single page on the screen; or as multiple pages on the screen. If you select **Multiple Pages**, a submenu enables you to select how many pages you want to display on the screen at one time.



Click the **Zoom Out / Zoom In** icons to control the view size on a single page display of the report. The view size changes in increments of 10%.

Click the **Zoom** drop-down list and select a page display view; or manually type a size in the field.

Click the **Previous Page / Next Page** icons to navigate up or down within the report, one page at a time. These icons are also known as **Page Up / Page Down**.



Use the **Page Counter / Page Total** icon to view the page number of the report currently being viewed; followed by the total number of pages in the document. For example, 1/15 means you are viewing page 1 out of a total of 15 pages.

Click the **Move Backward / Move Forward** icons to navigate back to a previously viewed page; or to navigate ahead in the report to a previously viewed page.

Downloading reports

You can download a report in one of three formats.

1. Select one of the following file formats from the drop-down list:
    - **Portable Document Format** (.pdf)
    - **Microsoft Excel Format** (.xls)
    - **Plain Text Format** (.csv)
2. Click the **Download Report** link.

Printing reports

Note: In order to properly print reports, you should be running Internet Explorer 5.0 or higher (the upgrade version) and have installed at least Service Pack 2.

To print reports from your browser:

1. Click either the **Print this page** or **Print all pages** link.

    The standard Windows *Print* dialog box opens.

2. Set your printer options, and click **Print**.

Running Reports

Today's business reports

You can generate an overall summary report, a leads or referrals report, and a report for each of the activity types available from Today's business.

To access Today's business:

- From the main menu, point to **Schedule**, **Today's business**, then click **Summary** or any one of the sub-options.

To view the Summary report:

1. From the *Today's business* page, specify a date range and an assigned agent.
    - click the **Date range** link to display the *Enter date range* pop-up window. Click the calendar icons to choose a **to** and **from** date, then click **OK**.
    - click the **Assigned to** drop-down list and select an agent name, or **All**.
    - click the **Start search** link to update the summary items for the specified date and agent.
2. Click **View report** from the action menu.

   The *Report options* page opens.
3. Select one of the following:
    - **All activities** (including Leads)
    - **Daily schedule** (text only)
4. Click **View report** from the control menu.

To view activity reports:

1. From the *[activity type] assigned to [agent] on [date]* page, highlight an item from the list. Use the **Select all** link to highlight the entire list.
2. Click **View report** from the action menu.

To view lead and referral reports:

You can view reports from the *Lead manager* and *Referral manager* pages. These are accessible from both the **Schedule** and **Contacts** main menus. See *"Lead reports" on page 592* and *"Referral reports" on page 593*.

Daily, weekly, or monthly schedule reports

You can print a selected agent's schedule for a specified day, week, or month. You are unable to print a report for the annual view of the scheduler.

To access the agent's schedule:

1. From the main menu, point to **Schedule**, then click **My schedule**.
2. By default, the **Day view** is displayed. Click on a date from the calendar at the right.

   Click either the **Week view** or **Month view** from the action menu to change the schedule view.

3. Click **Print schedule** from the action menu.

   The report is displayed in a new browser window.

Lead reports

You can run a report for a selected agent's leads, of all statuses.

To access the lead reports:

1. From the main menu, point to:
   - **Contacts**, then click **Leads**
   - **Schedule**, **Today's business**, then click **Leads**

   The *Lead manager* page opens.
2. Click the **Check for new leads** link to refresh the page view with any new leads not currently listed.
3. Select a lead status from the drop-down list: **All**, **New**, **Followed up**, **Listing**, **Listing-closing**, or **Closing**.
4. Highlight a lead from the list. Click the **Select all** link to highlight the entire list.
5. Click **View report** from the action menu.

Referral reports

You can search for specific referrals and run a report for a selected agent.

To access the referral reports:

1. Point to:
    - **Contacts**, then click **Referrals**; or
    - **Schedule**, **Today's business**, then click **Referrals**

    The *Referral manager* page opens.

2. Click the **Check for new referrals** link to refresh the page view with any new referrals not currently listed.

3. Click the **Search by** drop-down list to select one of the following:
    - **Referral direction**
    - **Referral source**
    - **Referral progress status**
    - **Referral to / by name**
    - **Referral contact name**
    - **Referral transaction status**

    The corresponding fields are displayed beneath the list box.

4. Enter the appropriate text, or select the item for which you want to search, then click the **Start search** link.

5. Highlight a referral from the list. Click the **Select all** link to highlight the entire list.

6. Click **View report** from the action menu.

    The "*Sent and Received referrals*" (corresponding to your search criteria) report is displayed in a new browser window.

Contact reports

You can run contact reports based on the address book and the search component. Also, you can generate a report of unsubscribed contacts.

To run the contact reports from the Address book:

1. From the main menu, point to **Contacts**, then click **Address book** to display the Address book.

2. Highlight a contact in the Address book, then click **View report** from the action menu.

   The *Report options* page opens.

3. Select one of the following options:

   - **Short phone and address list**
   - **Full phone and address list**
   - **Summary of contacts**
   - **Detailed contact entry report**
   - **Investment property report**
   - **Other property report**
   - **Contact history**
   - **Contact notes**

4. Click **View report** from the control menu.

   The specified report is displayed in a new browser window.

To run the contact reports by performing a search:

1. From the main menu, point to **Search**, then click **Search for contacts**.

2. Perform either a quick search or advanced search, (see *"Searching For Contacts" on page 175*).

   The *Search results* page opens.

3. Highlight an item from the list, or click the **Select all** link to highlight the entire list.

4. Click **View report** from the action menu.

   The *Report options* page opens.

5. Select one of the following options:

   - **Short phone and address list**
   - **Full phone and address list**
   - **Summary of contacts**
   - **Detailed contact entry report**
   - **Investment property report**
   - **Other property report**
   - **Contact history**
   - **Contact notes**

6. Click **View report** from the control menu.

The specified report is displayed in a new browser window.

To run an unsubscribed contacts report

1. On the **Setup** menu, under **Preferences**, click **Unsubscribe**.
2. On the action menu, click **View report.**
3. If you wish to include your subscribed contacts in this report, select the **Include subscribed contacts** check box. Otherwise, skip this step.
4. Select the date range for this report.
5. Click **OK.**

   Top Producer generates the report.

Listing reports

You can run listing reports based on a specified date range and listing status.

To access the listing reports:

1. From the main menu, point to **Listings**, then click **Current listings**.

   The *Current listings* page opens.

2. Specify a date range and a listing status.

   - click the **Date range** link to display the *Enter date range* pop-up window. Click the calendar icons to choose a **to** and **from** date, or select the **No date range** check box. Click **OK**.
   - click the drop-down list and select a listing status, such as **All active**, **Expired**, **Withdrawn**, etc.
   - click the **Start search** link to update the summary items for the specified date and status.

3. Highlight a listing from the list. Click the **Select all** link to highlight the entire list.
4. Click **View report** from the action menu.

   The *Report options* page opens.

5. Select one of the following options:

   - **Summary report**

- **Detailed report**
- **Marketing service report**

6. Click **View report** from the control menu.

   The specified report is displayed in a new browser window.

Closing reports

You can run closing reports based on a specified date range and closing status.

To access the closing reports:

1. From the main menu, point to **Closings**, then click **Current closings**.

   The *Current closings* page opens.

2. Specify a date range and a closing status:

   - click the **Date range** link to display the *Enter date range* pop-up window. Click the calendar icons to choose a **to** and **from** date, or select the **No date range** check box. Click **OK**.
   - click the drop-down list and select a closing status, such as **All statuses**, **Closed / Paid**, **Fell Thru**, etc.
   - click the **Start search** link to update the summary items for the specified date and status.

3. Highlight a closing from the list. Click the **Select all** link to highlight the entire list.

4. Click **View report** from the action menu.

   The *Report options* page opens.

5. Select one of the following options:

   - **Summary report**
   - **Detailed report**
   - **Closing service report**

6. Click **View report** from the control menu.

   The specified report is displayed in a new browser window.

Action plan reports

You can run reports for the several types of action plans found in Top Producer 7i.

To run action plan reports:

1. From the main menu, point to **Setup**, then click **Plans setup**.

   Note: If you are running listing or closing plan reports, you can also access the *Plans setup* page by pointing to **Listings**, then clicking **Listing plans**; or pointing to **Closings**, then clicking **Closing plans**.

   The *Plans setup* page opens.

2. Click the tab of the type of plan you want to see in a report:

   - **Action plans**
   - **Listings plans**
   - **Closing plans**
   - **Marketing report plans** (see *"Working With Marketing Service Reports" on page 473*).
   - **Closing report plans** (see *"Closing Service Plans" on page 546*).

3. From the **Action plan name** drop-down list, select a plan from the list.

4. Highlight one or more of the plan's activities in the list. Click the **Select all** link to highlight the entire list.

5. Click **View report** from the action menu.

   The "*Action Plan for [plan name] report*" is displayed in a new browser window.

To run marketing service reports:

1. From the main menu, point to **Listings**, then click **Current listings**.

   The *Current listings* page opens.

   Note: The **Marketing report plans** tab from the *Plans setup* page is used to create, edit, and manage marketing report plans. To run a marketing service report, you must do so from the *Current listings* page.

2. From the *Current listings* page, specify a date range and a listing status.
   - click the **Date range** link to display the *Enter date range* pop-up window. Click the calendar icons to choose a **to** and **from** date, or select the **No date range** check box. Click **OK**.
   - click the drop-down list and select a listing status, such as **All active**, **Expired**, **Withdrawn**, etc.
   - click the **Start search** link to update the summary items for the specified date and status.
3. Highlight a listing from the list. Click the **Select all** link to highlight the entire list.
4. Click **View report** from the action menu.

   The *Report options* page opens.
5. Select the **Marketing service report** option.
6. Click **Create service report** from the control menu.

   The *Marketing service report* page is displayed, enabling you to create your report. See "Working With Marketing Service Reports" on page 473.

To run closing service reports:

1. From the main menu, point to **Closings**, then click **Current closings**.

   The *Current closings* page opens.

Note: The **Closing report plans** tab from the *Plans setup* page is used to create, edit, and manage closing report plans. To run a closing service report, you must do so from the *Current closings* page.

2. From the *Current closings* page, specify a date range and a listing status.
   - click the **Date range** link to display the *Enter date range* pop-up window. Click the calendar icons to

choose a **to** and **from** date, or select the **No date range** check box. Click **OK**.
- click the drop-down list and select a closing status, such as **All statuses**, **Closed / Paid**, **Fell Thru**, etc.
- click the **Start search** link to update the summary items for the specified date and status.

3. Highlight a closing from the list. Click the **Select all** link to highlight the entire list.

4. Click **View report** from the action menu.

   The *Report options* page opens.

5. Select the **Closing service report** option.

6. Click **Create service report** from the control menu.

   The *Closing service report* page opens, enabling you to create your report. See *"Closing Service Reports" on page 535*.

Income and expense reports

Run a report for the folder you are viewing in the *Income and expense tracker* for a specified period of time. Choose from:

- **Overview**
- **Summary**
- **Detailed**
- **Month-to-month net income**

Each report is more detailed than the last, as you progress down the list.

To access the income and expense reports:

1. From the main menu, point to **Financial**, then click **Income and expenses**.

   The *Income and expense tracker* page opens.

2. Highlight a folder from the list, then click **Report** from the action menu.

3. From the *Income and expense report* page, specify a date range and a report type.

   - In the **Select date range** section, specify a **Start date** and **End date** by clicking the calendar icons.

- In the **Select report type** section, select the type of report that you want to generate (as outlined below).

4. Click **View report** from the control menu.

Overview report

This report displays the following information for a selected folder and a specified date range:

> **Note:** If you are using a Canadian version, the total amount of GST for each category will also be displayed.

- **Income** — displays the total income amount for each category within the selected folder.
- **Total income** — displays the total income amount for all of the categories within the selected folder.
- **Expense** — displays the total expense amount for each category within the selected folder.
- **Total expenses** — displays the total expense amount for all of the categories within the selected folder.
- **Total net income** — displays the total net income for the entire folder.

Summary report

This report goes a step further than the **Overview** report. It displays the same information as the **Overview** report, but also includes the sub-category level information for a selected folder and a specified date range:

> **Note:** If you are using a Canadian version, the total amount of GST for each sub-category and category will also be displayed.

- **Income** — displays the total income amount for each sub-category within each category in the selected folder.
- **Total income** — displays the total income amount for all of the sub-categories within each category.
- **Expense** — displays the total expense amount for each sub-category within each category.
- **Total expenses** — displays the total expense amount for all of the sub-categories within each category.
- **Total net income** — displays the total net income for the entire folder.

Detailed report

The **Detailed report** displays all item information in each sub-category and category of the selected folder. Item information includes date of item creation, amount, check number, invoice number and taxes.

Note: If you are using a Canadian version, the total amount of GST for each item will also be displayed.

Month-to-month net income report

This report displays the income, expense and net income for each month in the selected date range, as well as total income, total expenses and net income.

Converting, Importing, And Exporting Data

In this chapter:

Converting Your Top Producer Desktop Data

Full vs. partial desktop database conversions

The *Top Producer Data Conversion Wizard* is a utility that is easily saved onto your computer desktop from the Top Producer 7i **Setup** menu so that you can:

- Convert your existing Top Producer desktop database(s) into Top Producer 7i by performing a full conversion (see *"Performing a full data conversion for first time users" on page 607*.)
- Convert only the newest features that have been added to Top Producer 7i in the latest release (see *"Performing a partial data conversion for existing users" on page 613*.)

What Data Is Converted During A Full Conversion?

The following data will be converted during a full conversion:

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

You can also import contact data from a number of different programs, or from a standard.CSV file. For information on how to do this, refer to the Top Producer 7i User Guide or online Help.

What Data Is Converted During A Partial Conversion?

If you have already converted your Top Producer desktop database(s) into Top Producer 7i, you can convert the desktop data for the newest features without being required to perform a full conversion and without the fear of duplicating your data.

The following data from your Top Producer desktop database will be converted during a partial conversion:

- Income and Expenses data
- Buyer/seller net sheets
- Service report options and service report comment library
- Service report plans (excluding activities marked “done”)

Preparing for a full Top Producer desktop data conversion

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

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

(A) Activities That Are Assigned To Assistants

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

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

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

1. To create an assistant in Top Producer 7i, highlight **Setup**, then click **Agent setup**. From the *Agent setup* page, click **Assistants** from the action menu. If you have already created assistant accounts, they will appear on the *Assistants* page, (see *“Agent Setup” on page 35*).

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

Note: You must ensure that the online assistant first and last names (located in the **Name details** section of the *Assistant information* page) exactly matches the assistant's Top Producer desktop application login name. Otherwise, the activities will not be properly assigned after the conversion. For more information, see *"Specifying assistant information" on page 37*.

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

(B) Synchronize all Remote computers and handheld devices

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

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

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

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

(C) Back up your database

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

(D) Microsoft Windows 2000 users

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

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

Saving the Top Producer Data Conversion Wizard to your Desktop

Once you have completed the preparatory steps described in *"Preparing for a full Top Producer desktop data conversion" on page 604* proceed as follows to download and install the *Top Producer Data Conversion Wizard* to your desktop.

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

1. Complete the following:
   - Close all open applications, including your Top Producer desktop application, and log into Top Producer 7i.
   - From the main menu, point to **Setup**, then click **Data transfer/conversion** and **Convert my Top Producer desktop data**.
   - When the *Data Conversion from Top Producer Desktop* dialog box appears, click **OK**. Skip to step 3.
2. From the *Setup Wizard - Data transfer* page:
   - Select the Top Producer 7i **Data Conversion Wizard** check box.
   - Click **Close** from the control menu.
     The *Close setup wizard* dialog box opens.
   - Click **Yes** to exit the wizard.
     The *Data Conversion from Top Producer Desktop* dialog box opens.
   - Click **OK** to download the *Top Producer Data Conversion Wizard*. Proceed to step 3.
3. From the *File Download* pop-up window:

- click **Save** (or, **Save this program to disk** and click **OK**) to save the conversion program to your hard drive.
  The *Save As* pop-up window opens. Proceed to step 4.
- click **Open** to save the program to a temporary folder. Proceed to *"Performing a full data conversion for first time users" on page 607*.

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

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

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

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

Performing a full data conversion for first time users

Follow these instructions to perform a full data conversion if any of the following scenarios apply to you:

- You are a new user of Top Producer 7i and need to perform a full conversion of your Top Producer desktop database(s)
- If you have previously tried to convert your data and the conversion failed, i.e., the Top Producer desktop data was NOT uploaded or transmitted successfully into Top Producer 7i
- If you cancelled the conversion process after it had begun, i.e., the Top Producer desktop data was NOT uploaded or transmitted successfully into Top Producer 7i

  If you are an existing Top Producer 7i user who has previously converted your Top Producer desktop database, but would like to convert only the new features, see *"Performing a partial data conversion for existing users" on page 613*.

For information on setting up Top Producer for Palm Handhelds, Top Producer SellPhone, or Top Connector 7i, see *"Converting multiple Top Producer desktop databases" on page 616*.

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

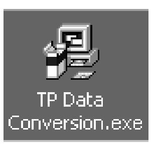
To perform a full database conversion:

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

   For more information, see *"Preparing for a full Top Producer desktop data conversion" on page 604*.

2. Once you have downloaded the **TP Data Conversion.exe** file to your desktop, double-click the icon to install and open the *Top Producer Data Conversion Wizard*.

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



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

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

3. Click **Next**.

Note: If any assistants are detected in your Top Producer desktop application, you will see the *Assistants detected* window before you see the *Top Producer Desktop login* window. This window advises you that if you have assistants in your Top Producer desktop application who have activities assigned to them, the activities will be reassigned to the agent if the assistant accounts are not created first in Top Producer 7i. If this applies to you, and you have not created the assistant accounts in Top Producer 7i, cancel the data conversion, and log in to Top Producer 7i. To create the assistants, point to **Setup** and click **Agent setup**. From the *Agent setup* page, click

Assistants from the action menu. See *"(A) Activities That Are Assigned To Assistants" on page 604*. Then, run the *Top Producer Data Conversion Wizard* again. Otherwise, click **Next** to proceed.

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

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

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

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

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

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

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

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

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

---

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

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

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

WARNING!

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

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

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

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

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

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

    The *Data Conversion Wizard - Converting your data* window will display the progress of the data upload. If you have a large Top Producer database, this may take a while.

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

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

> **Note:** The time required to convert your data will depend on a number of factors. It may be as short as one hour, but you should allow up to 24 hours. If you do not receive an email within 24 hours stating that the conversion was successful, then contact Top Producer Technical Support to find out the status of your conversion. For more information, see *"Contacting Technical Support" on page 655*. Once you have converted your data into Top Producer 7i, you should NOT continue to use your Top Producer desktop application.

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

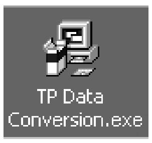
Note: Any data that could not be converted into a specific field due to data type inconsistencies will be placed into the relevant **Notes** field of the contact record, (see *"Managing notes from the contact record" on page 139*).

Performing a partial data conversion for existing users

If you are an existing Top Producer 7i user who has previously converted your Top Producer desktop database, but would like to convert only the new features that are now available in Top Producer 7i - Income and Expenses, Buyer/Seller Net Sheets, Service Report options, Service Report Comment library, and Service Report Plans (excluding activities marked “done”), you can convert these without performing a full data conversion.

To perform a data conversion for only the new features:

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



1. Once you have downloaded the **TP Data Conversion.exe** file to your desktop, double-click the icon to install and open the *Top Producer Data Conversion Wizard*.

   See *“Saving the Top Producer Data Conversion Wizard to your Desktop” on page 606*.

   The *Welcome to the* Top Producer 7i *Data Conversion Wizard* page is displayed.

2. Click **Next**.

Note: If any assistants are detected in your Top Producer desktop application, you will see the *Assistants detected* window before you see the *Top Producer Desktop login* window. This window advises you that if you have assistants in your Top Producer desktop application who have activities assigned to them, the activities will be reassigned to the agent if the assistant accounts are not created first in Top Producer 7i. If this applies to you, and you have not created the assistant accounts in Top Producer 7i, cancel the data conversion, and log in to Top Producer 7i. To create the assistants, point to **Setup** and click **Agent setup**. From the *Agent setup* page, click **Assistants** from the action menu. See *“(A) Activities That Are Assigned To Assistants” on page 604*. Then, run the *Top Producer Data Conversion Wizard* again. Otherwise, click **Next** to proceed.

---

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

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

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

---

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

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

WARNING!

If you see the *How do you want to convert your data?* window, DO NOT select the option to perform a full conversion of your Top Producer desktop database, or your data in Top Producer 7i will be duplicated.

The *Conversion of new components* window opens.

6. Click **Next** to proceed with the partial conversion.

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

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

Your data will begin uploading to Top Producer 7i for conversion. The *Data Conversion Wizard - Converting your data* window will display the progress of the data upload. If you have a large Top Producer database, this may take a while.

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

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

Note: The time required to convert your data will depend on a number of factors. It may be as short as one hour, but you should allow up to 24 hours. If you do not receive an email within 24 hours stating that the conversion was successful, then contact Top Producer Technical Support to find out the status of your conversion. See *"Contacting Technical Support" on page 655*. Once you have converted your data into Top Producer 7i, you should NOT continue to use your Top Producer desktop application, since you cannot convert your desktop database again.

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

Converting multiple Top Producer desktop databases

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

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

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

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

To locate these contacts in Top Producer 7i, perform a search by Contact type, and select the database name (for example, “farm prospects”) as your search criteria. For information on using the search feature, see the Top Producer 7i User Guide.

Converting Your Online Software Data

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

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

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

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

This section tells you how to:

- complete the necessary steps before converting your data (see below).
- download the *Online Software Conversion Wizard* (see *page 618*).
- run the conversion program (see *page 619*).

Preparing for the Online Software conversion

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

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

Saving the Online Software Conversion Wizard to your desktop

Once you have taken the necessary steps to prepare for the conversion (see page 617), follow these steps to download the *Online Software Conversion Wizard*.

To download the wizard:

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

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1. Complete the following:
   - Log into Top Producer 7i.
   - From the main menu, point to **Setup**, **Data transfer/conversion**, and then click **Convert my Online Software data**.
     The *Data Conversion from Online Software Program* dialog box opens.
   - Click **OK**.
     The *File Download* pop-up window opens. Skip to step 3.
2. From the *Setup Wizard - Data transfer* page:
   - Select the Top Producer 7i **Online Software Conversion Wizard** check box.
   - Click **Close** from the control menu.
     The *Close setup wizard* dialog box opens.
   - Click **Yes** to exit the wizard.
     The *Data Conversion from Online Software Program* dialog box opens.
   - Click **OK** to download the *Online Software Conversion Wizard*. Proceed to step 3.
3. If:
   - you have downloaded the *Online Software Conversion Wizard* before, click **Open** to open the wizard. Skip to *"Converting your data", on page 619.*
   - this is your first time downloading the *Online Software Conversion Wizard*, proceed to step 4.
4. To save the installation file to a location on your hard drive, complete the following:
   - Click **Save**.
     The *Save as* pop-up window opens.
   - From the **Save in** drop-down list, specify the directory where you want to save the **TP Online**

Software Conversion.exe file (it is recommended that you save it on your **Desktop**).

- Click **Save**.

The file is saved to the location you specified.

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

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

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

Converting your data

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

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

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

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

   The *Online Software Conversion Wizard* opens.

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

4. If:

   - you have NOT entered an assistant in the Online Software application, the Top Producer 7i *login* window opens. Skip to step 5.
   - you have entered an assistant in the Online Software application, the *Assistants detected* window opens. This window advises you that if you have assistants in your Online Software application who have activities assigned to them, the activities will be reassigned to the agent if the assistant accounts are not created first in Top Producer 7i.

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

Otherwise, click **Next** to proceed.

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

6. If you:

   - have never converted your Online Software data, skip to step 8.
   - have already converted your Online Software database successfully, to avoid duplication, you will not be able to perform the conversion again. The *Data conversion was successful* window will appear, telling you that your database has already been converted. Click **Close**.
   - recently ran the *Online Software Conversion Wizard* and your data is still being converted, the *Data conversion is in progress* window will appear. Click **Cancel** to close the wizard.
   - previously tried to convert your data and the conversion failed, or you cancelled the conversion once it had begun, the *Data conversion recovery* window will appear. Proceed to step 7.

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

   - **Retransmit my converted data to** Top Producer 7i if you have NOT entered data into your Online Software database since your previous conversion attempt. Click **Next**.
   - **Start the data conversion process over again from the beginning** if you have entered data in your Online Software program since your previous conversion attempt. Click **Next**.

8. If:

   - there are NOT multiple users set up in the Online software application and Top Producer 7i, skip to step 9.
   - there are multiple users set up in both applications AND there are activities that are assigned to these users, the *Match Online Software activities to 7i users* window appears.

     To assign these activities to the appropriate user, select the activity, then select the user from the **7i**

Users column, and then click the **Add** arrow. Repeat these steps until all activities are assigned to the appropriate user, and then click **Next**.

9. If:

   - you have entered your email address in Top Producer 7i Agent setup, proceed to step 10.
   - you have not yet entered your email address in Top Producer 7i Agent setup, the Top Producer 7i *email address* window opens. Enter your email address and then click **Next**.
     The *Conversion notification email address* window opens.

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

11. Click **Next**.

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

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

    The time required to convert your data will depend on a number of factors. It may be as short as one hour, but you should allow up to 24 hours. If you do not receive an email within 24 hours stating that the conversion was successful, then contact Top Producer Technical Support to find out the status of your conversion (see *“Contacting Technical Support” on page 655*).

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

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

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

Note: Any data that could not be converted into a specific field due to data type inconsistencies will be placed into the relevant **Notes** field of the contact record, (see *"Managing notes from the contact record" on page 139*).

Transferring Data To Hot Marketer 2.0

You can transfer your contact data from Top Producer 7i into Hot Marketer 2.0 by exporting the data to a file and then running the *Hot Marketer Data Transfer Wizard* found on the Hot Marketer 2.0 CD. Basic contact information, including the default property photo for each contact in your database will be transferred.

To transfer data into Hot Marketer 2.0:

1. Point to **Setup**, then click **Data transfer/ conversion**, and **Transfer data to Hot Marketer**.
2. Read the information in the *Data transfer in progress* message box, and click **OK**.
3. Save the **Tp_to_hm.csv** file to a directory (the Windows desktop is recommended for convenience).
4. Read the information in the *Data transfer complete* message box, and click **OK**.
5. Use the *Hot Marketer Data Transfer Wizard* on your Hot Marketer 2.0 CD to import the data file you saved on your desktop into Hot Marketer 2.0. See the Hot Marketer 2.0 Quick Start Guide or online Help for instructions on how to do this.

Importing Data

The Top Producer 7i *Data Transfer Wizard* lets you import contact, lead, and referral information from a number of common programs (for example, Microsoft Outlook, ACT!, GoldMine, etc.), as well as comma-separated value files (.CSV) or text files (.TXT) into your Top Producer 7i database.

Note: The **Top Producer 6i / 6 Data Conversion** option is discussed in *"Converting Your Top Producer Desktop Data" on page 603*.

Before you import your data

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

Before you begin using the Top Producer 7i *Data Transfer Wizard*, you will need to follow these steps.

1. In the program where your contact data is stored, use the export function to create a source file. If available, choose.CSV format, otherwise, select the text format (.TXT) option. Refer to the third-party's documentation to learn how to export contacts.

2. Save the source file (.CSV or .TXT) to your computer. It is recommended that you save it on your desktop.

Saving the Top Producer 7i Data Transfer Wizard to your Desktop

To download the Top Producer 7i Data Transfer Wizard:

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

1. Complete the following:

   - Log into Top Producer 7i.
   - From the main menu, point to **Setup**, **Data transfer / conversion**, and then click **Import data**. The *File Download* pop-up window opens. Skip to step 3.

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

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

- Click **Close** from the control menu.
  The *Close setup wizard* dialog box opens.
- Click **Yes** to exit the wizard.
  The *Data Conversion from Top Producer Desktop* dialog box opens.
- Click **OK** to download the *Top Producer Data Conversion Wizard*. Proceed to step 3.

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

   The *Save As* pop-up window opens.

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

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

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

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

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

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

Using the Top Producer 7i Data Transfer Wizard

Use the 9-step wizard to transfer your data into Top Producer 7i.

To perform a data import using the Top Producer 7i Data Transfer Wizard:

1. From the list of programs in Step 1, select the program that the contacts were exported from. For example, select **Maximizer CSV file**.

Note: If you do not see the program you used to create your source file in the list, you can still import your data. Select **.CSV file** from the list.

2. Click **Next**.

Step 2 of 9 opens.

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

   Step 3 of 9 opens.

4. Select the source file (created from the program you are importing from) that you want transferred into Top Producer 7i.

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

   b) Click the **Files of type** drop-down list and select **Comma Separated Values (*.CSV)** or **Text files (*.TXT)**.

   c) Click the **Look in** drop-down list and navigate to the location of the source file on your computer. Select the file and click **Open**. The selected file and its path appear in the **Select data file** section.

   d) Click **Next** to proceed to the field mapping utility.

   Step 4 of 9 opens.

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

   a) If you selected:

   - a source program from the list (i.e., ACT!, Gold-Mine, Maximizer, etc.), these mapping settings will be automatically defined. Do NOT change these settings.
   - a .CSV or .TXT file, you will need to manually map your data, (see *"Mapping data from an import file" on page 629* for instructions).

Note: If your source file contains header information, ensure that the **First row is a header row** check box is selected; otherwise, the header values in the first record will be imported as a separate contact record.

b) Click **Next**.

Step 5 of 9 opens.

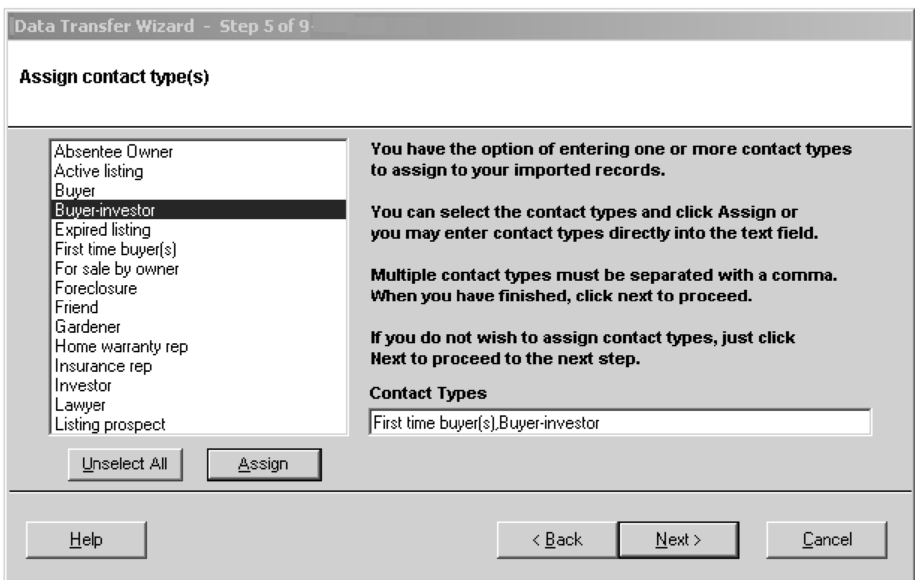
6. By assigning a unique contact type to the contacts being imported, you can easily locate these contacts later and edit/delete them as a group, if the import was not successful or any errors occurred.

If you do not assign a unique contact type to the data being imported and an error occurs, you may have to search your entire database one record at a time to locate the corrupt contact records.

Note: This step is optional, but is highly recommended.

You can assign one or more contact types to the records you are importing. Any contact types selected will be assigned to ALL of the imported contacts' records.

a) Select one or more contact types from the list, then click **Assign**.



If you used the word "Imported" as a Contact type, you can search for and view only the imported contacts using the **Quick search** feature (see *"Searching For Contacts" on page 175*). You can then assign additional contact types to each imported contact depending on their roles.

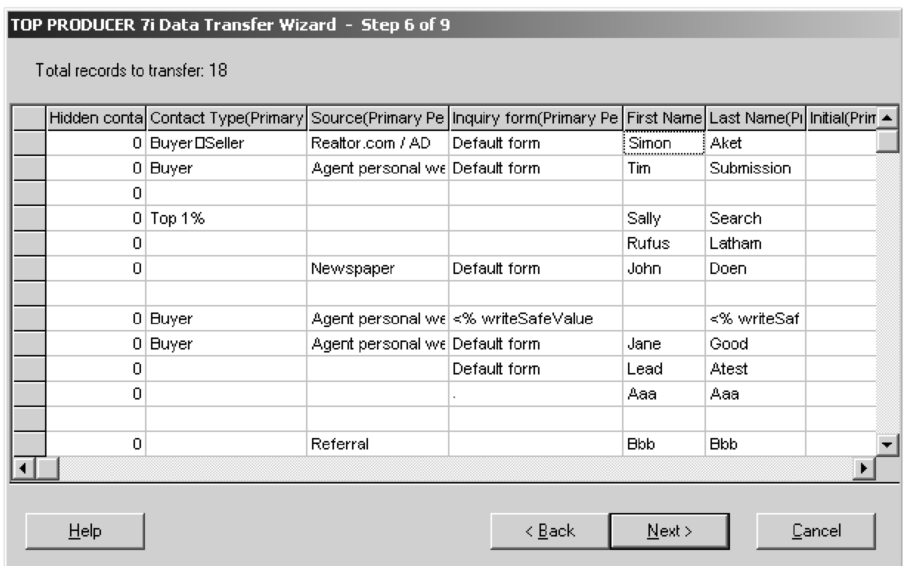
- You can also type directly into the **Contact types** field. Any contact type you enter manually will be added to the list of Top Producer 7i contact types, and you can search for this group in Top Producer 7i using the Quick search feature, (see *"Searching for contacts using Quick search" on page 176*).
- If you do not know what to enter in the **Contact types** field, then use the word "Imported" along with the current date. For example, "Imported_Aug_05_2003".

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

b) Click **Next**.

Step 6 of 9 opens.

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



- If it appears that the data is **NOT** correctly mapped, make a note of which fields are incorrect and click **Back** twice to return to the mapping process (Step 4 of 9). See *"Mapping data from an import file" on page 629* for information on how to correctly map import fields.
- If the data is mapped correctly, click **Next**.

Step 7 of 9 opens.

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

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

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

Step 8 of 9 opens.

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

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

Step 9 of 9 opens.

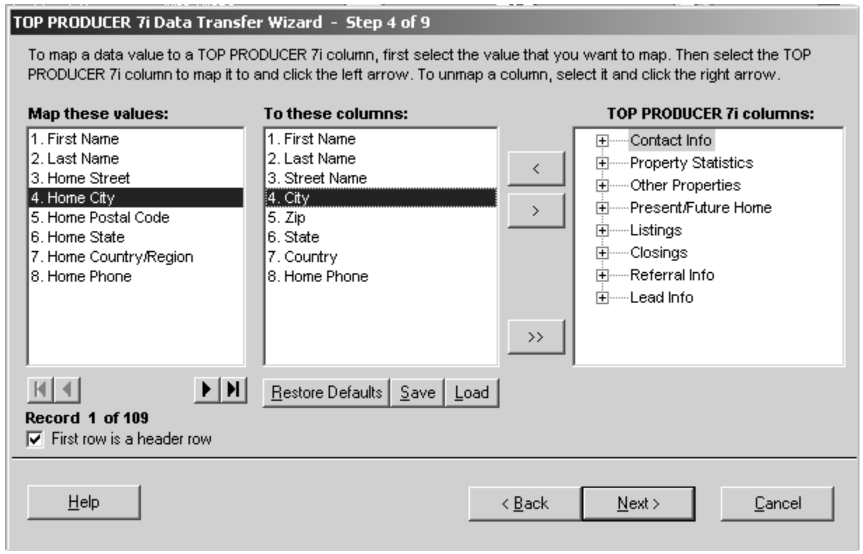
10. When the data transfer is complete, click **Finish**. When the data has been successfully imported into Top Producer 7i, you will be sent an email advising that the import process is finished. At that time, you can safely log in to Top Producer 7i and review the data you have imported to ensure it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

Mapping data from an import file

A comma-separated values file (.CSV) consists of one record per line with a comma [,] separating each field. The values in the first row are header fields that name the columns.

The Top Producer 7i *Data Transfer Wizard* allows you to transfer data from a number of common programs (such as Microsoft Outlook, ACT!, Goldmine etc. which are available for selection in Step 1 or 9 of the wizard).

However, if the source file (.CSV or .TXT file) you are importing is NOT from one of these programs, you will need to indicate which fields from the source file correspond to which data fields in Top Producer 7i. This is known as field mapping. For example, you will need to map the **First name** field in the source file to the Primary person's **First name** field in Top Producer 7i.



Simple data mapping

Using the integrated field mapper included in the Top Producer 7i *Data Transfer Wizard*, is the simplest way to organize your data for import. This Simple Data Mapping option is recommended if:

- You are importing data from a program that is NOT listed in the Top Producer 7i *Data Transfer Wizard* list box (Step 1 of 9)
- You are NOT comfortable manipulating database or spreadsheet data

Note: These instructions assume you have already exported and saved your data into a source file, (see *“Before you import your data” on page 624*).

1. When the map settings window is displayed (Step 4 of the wizard), all of the values for each record in each row of the source file are displayed as separate records in the **Map these values** list. In some cases, the first record will contain all of your header values (for example, they will begin with the first contact’s data).

    - If your source file contains header information, ensure that the **First row is a header row** check box is selected; otherwise, the header values in the first record will be imported as a separate contact record.

2. You will need to map each individual field you would like imported from the **Map these values** list to its matching Top Producer 7i field name in the adjacent **To these columns** list. Some values have been automatically matched for you. However, you should still check that these are correct. For those items not matched, select the first blank item in the **To these columns** list. Then, select the corresponding column in the Top Producer 7i **columns** list. You can expand and collapse categories using the **[+]** and **[-]** icons. Select the field value and click the left arrow button **[<]** to add it to the **To these columns** list.

   For example, if the first item in the **Map these values** list is a contact's first name, or if it is a header entitled **First name**:

   a) In the Top Producer 7i **columns** list, click the **[+]** icon next to the relevant column (**Contact Info**) to expand this category until you reach the relevant field (**Primary Person**, then click **First name**).

   b) Click the left arrow button **[<]** to add the selected field name (**First name**) into the **To these columns** list. This will map the selected value to the selected Top Producer 7i **column** when importing.

3. Repeat Step 2 above for all of the values you want to import. If you do not map an item and the adjacent **To these columns** value is blank, that information will not be imported.

4. To:

   - Un-map a single value, select that value in the **To These Columns** grid and click the right arrow button **[>]**.
   - Un-map all values, click the double right arrow button **[>>]**.
   - Scroll through the records in the file you are importing from, click the next or previous arrow buttons located below the **Map these values** list.
   - Move to the start or finish of the source file, click the first page or last page buttons located below the **Map these values** list.
   - If you have modified the default mappings in the **To these columns** list and you want to reset the mappings (for instance if you are importing a

source file from Maximizer, Outlook, or any of the recognized programs in Step 1), click the **Restore Defaults** button. The default mappings will be restored.

5. If you have defined your mapping values and want to keep them for reuse, click **Save**.

   The *Save As* pop-up window opens.

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

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

6. To use pre-defined and saved mapping values that you worked with previously, click **Load**.

   The *Open* pop-up window opens.

   a) Navigate to the saved .TXT file, and click **Open**. Your saved settings will be loaded.

7. When you are finished mapping all of the desired values, click **Next**.

   You will be returned to (Step 5 of 9) of the Top Producer 7i *Data Transfer Wizard* to continue the import process, (see *"Using the Top Producer 7i Data Transfer Wizard" on page 625*).

Manual data mapping

Mapping your data fields using an industry-standard spreadsheet program, such as Microsoft Excel, is more difficult and requires you to manually manipulate the source file's header row and possibly the data. This Manual Data Mapping option is available if:

- You are importing data from a program that is NOT listed in the Top Producer 7i *Data Transfer Wizard* list (you selected .CSV file in Step 1)
- You have a good understanding of how spreadsheets work
- You are comfortable manually manipulating the data in your .CSV file so that Top Producer 7i can recognize and import it correctly

Note: These instructions assume you are attempting to import a .CSV file created using an industry-standard spreadsheet program.

About Header Fields

We have provided a complete list of the data fields that can be imported into Top Producer 7i. By inserting the appropriate header field names into the first (header) row of the source file (.CSV or .TXT file), you can be assured that the data in the source file will be imported into the correct matching fields in Top Producer 7i.

TIP: If you import data frequently, save the header row by itself to a file. By doing this, you can easily use the file to map any subsequent data in the proper format, quickly and easily.

> **Note:** The data in your .CSV file can be in any order (for example: **Company Name**, **Street**, **First Name**, etc.). As long as the correct Top Producer 7i header field names are inserted above each column of data in your .CSV file and you map these values correctly, then the data will be imported into the correct fields in Top Producer 7i.

How to Format the .CSV Data File:

1. It is recommended that you print the list of header fields (see *"Contact information" on page 634*), then review the header field names and their descriptions.

Header fields appear in the first row (called the header row) of a .CSV file, above the corresponding column of data.

2. Open your .CSV file in a spreadsheet application, such as Excel.

   - If the first row in your .CSV file contains data (i.e., names, addresses, and phone numbers, etc.), then you must insert a blank row above the first row of data for your header names.
   - Type the appropriate header field name from the list above each column so that the header field name matches the type of data contained in that column.
   - If your .CSV file contains many data fields, you may have to scroll to the right to view all of them. You must insert a corresponding header field name for each column of data that you want to import from your .CSV file.

   To illustrate, if your .CSV data file contains the primary contact's **First name**, **Last name**, **Street name**, and **House number**, these field names need to be inserted above each column of data. Here is a very simple example of how a properly formatted .CSV file might appear when viewed in a spreadsheet application.

	A	B	C	D
1	Primary FirstName	Primary LastName	Street	House Number
2	John	Smith	Elm St.	1500
3	Michael	Anderson	Pinetree Way	2050
4	Marie	Henderson	Main Street	1475
5	Andy	Jones	River Road	902

3. Save and close the .CSV file when you are finished.

4. Use the Top Producer 7i *Data Transfer Wizard* to import the formatted .CSV file into Top Producer 7i, (see *"Using the Top Producer 7i Data Transfer Wizard" on page 625*).

Contact information header fields

The fields listed may or may not be available to you, depending on the version (or franchise version) of Top Producer 7i you are currently using. To verify all fields that you have access to, simply perform an export from Top Producer 7i to a file and view the header row in a spreadsheet program. Take note of all fields that are available.

- The field names in the list of header fields are NOT case-sensitive, although you should try to follow them as closely as possible.
- To print the list, click the cursor in the pane, then click the **Print** toolbar icon.

Contact information

Note: The fields that appear in bold-italics, ***Contact ID*** and ***Property Type***, are system fields and should not be modified. For more information on system fields, see *"Important Note About System Fields" on page 639*.

Header field name	Description
Contact ID	**Contact ID association field. A unique sequence of characters to denote the contact's ID. This should NOT be edited in any way.**
Contact Type	**Contact types assigned to this contact.**
Source	**Source of the primary contact.**
Inquiry Form	**Inquiry form of the primary contact.**

Header field name	Description
Urgency	Urgency (prioritization) of the contact.
Primary FirstName	First name of the primary contact.
Primary LastName	Last name of the primary contact.
Primary Initial	Middle initial of the primary contact.
Primary NickName	Nickname of the primary contact.
Primary Jr_Sr	Jr., Sr. name suffix of the primary contact.
Primary Mr_Mrs	Mr., Mrs. name prefix of the primary contact.
Primary Title	Title of the primary contact, for example, Manager.
Primary Designation	Designation of the primary contact, for example, CRS, GRI.
Letter Salutation	Letter salutation.
Envelope/Label Salutation	Envelope/Label salutation.
Company	Company name.
Primary Gender	Gender of the primary contact.
Primary Birthday	Birthday of the primary contact (MM/DD/YYYY format)
Email Address	Email address of the primary contact.
Web Address	Web address of the primary contact.
Other Email_Web Addr	Other email/web address of the primary contact, for example, me@you.com.
Other Email_Web Desc	Description of other email/web address of the primary contact, for example, Home email.
Other Email_Web Type	Type of other email/web address of the primary contact (can only be Email or web site).
Home Phone	Home phone number of the primary contact.
Home Phone Ext	Home phone number extension of the primary contact.
Home Ph Desc	Description of home phone number of the primary contact, for example, Unlisted number.
Bus Phone	Business phone number of the primary contact.
Bus Phone Ext	Business phone number extension of the primary contact.
Bus Ph Desc	Description of business phone number of the primary contact, for example, Downtown office.
Other Phone	Other phone number of the primary contact.
Other Phone Ext	Other phone number extension of the primary contact.
Other Ph Desc	Description of other phone number of the primary contact, for example, Second line.

Header field name	Description
Other Ph Nums Title	Title of second other phone number of primary contact, for example, Cellular.
Other Phone Nums	Second other phone number of the primary contact.
Other Phone Nums Ext	Second other phone number extension of the primary contact.
Other Ph Nums Desc	Description of second other phone number of the primary contact.
Mobile Phone	Mobile phone number of the primary contact.
Mobile Phone Ext	Mobile phone number extension of the primary contact.
Mobile Ph Desc	Description of mobile phone number of the primary contact, for example, Car phone.
Pager Number	Pager number of the primary contact.
Pager Ext	Pager number extension of the primary contact.
Pager Desc	Description of pager number of the primary contact, for example, Work pager.
Fax Number	Fax number of the primary contact.
Fax Ext	Fax number extension of the primary contact.
Fax Desc	Description of fax number of the primary contact, for example, Home office.
Contact Note Date	Date of the contact note.
Contact Notes	Contact notes (3000 character max.)
Secondary FirstName	First name of the secondary contact.
Secondary LastName	Last name of the secondary contact.
Secondary Initial	Middle initial of the secondary contact.
Secondary NickName	Nickname of the secondary contact.
Secondary Jr_Sr	Jr., Sr. name suffix of the secondary contact.
Secondary Mr_Mrs	Mr., Mrs. name prefix of the secondary contact.
Secondary Title	Title of the secondary contact.
Secondary Designation	Designation of the secondary contact.
Secondary Gender	Gender of the secondary contact.
Secondary Birthday	Birthday of the secondary contact (MM/DD/YYYY) format.
FF FirstName	Family/friend’s first name.
FF LastName	Family/friend’s last name.
FF Birthday	Birthday of family/friend contact (MM/DD/YYYY format).
FF Relation	Relation to the primary contact, for example, sister.

Header field name	Description
FF Resident	Resides with the primary contact. Must be Yes, or left blank for No.
Asst FirstName	First name of the primary contact’s assistant.
Asst LastName	Last name of the primary contact’s assistant.
Asst Initial	Middle initial of the primary contact’s assistant.
Asst Designation	Designation of the primary contact’s assistant.
Asst Email	Email address of the primary contact’s assistant.

Property Statistics

Header field name	Description
Property Type	The type of property of the particular address. Primary properties should contain a value of Primary and Investment properties a value of Investment. Other values may appear here from time to time.
House Number	House number.
Direction Prefix	Direction prefix, for example, N, S, E, W.
Street	Street name.
Street Designator	Street designator, for example, Avenue, Street, etc.
Direction Suffix	Direction suffix, for example, N, S, E, W.
Suite No	Suite number.
PO_BOX	Post office box number.
Bldg_Floor	Floor.
City	City.
County	County.
State	State.
Zip	ZIP code.
Country	Country.
List Price	List price of the current property.
Sales Price	Sale price of the current property.
Taxes	Taxes on the current property.
Tax Year	Tax year of the current property.
Tax Asses	Tax assessment of the current property.
Land Asses	Land assessment of the current property.

Header field name	Description
Air Con	Air conditioning type.
RV Parking	Recreational vehicle parking availability. Must be Yes or left blank for No.
Attached	Attached property. Must be Y or N.
Bldg Improve	Building improvements value, in $, of the current property.
Tax Roll No	Tax roll number of the current property.
Year Built	Year the current property was built.
Bedrooms	Number of bedrooms in the current property.
Bathrooms	Number of bathrooms in the current property.
Lot Size	Lot size of the current property.
Sq Feet	Square footage of the current property.
Levels	Number of levels of the current property.
House Style	House style of the current property.
Parking	Description of available parking at the current property.
Zoning	Zoning of the current property.
Flooring	Description of the flooring in the current property.
Dist To Transit	Distance to transit from the current property.
Dist To School	Distance to school from the current property.
Last Sold	Date of last sale of the current property (MM/DD/YYYY format).
Heating	Description of heating type in the current property.
Roof	Description of the roof type on the current property.
Other Items	Description of other items affecting the current property, for example, built-in vacuum.
Construction	Description of construction of the current property.
Exterior	Description of exterior construction of the current property.
Area	Description of area location of the current property.
Fireplaces	Description of fireplaces in the current property.
Basement	Description of the basement in the current property.
Sewer	Description of the sewer in the current property.
Water	Description of the water supply in the current property.
Financing	Description of financing on the current property.
Legal Descr	Legal description of the current property.
Property Descr	Description of the current property.

Header field name	Description
Room Description	Description of an additional room of the current property.
Room Length	Length of an additional room in feet.
Room Width	Width of an additional room in feet.
Room Dimension	Length and width of standard rooms of the current property, for example, Living room [x] x [y].
Room	Description of a feature room of the current property, for example, Great room.
Features	Description of other features of the current property, for example, Pool.
Site/View	Description of the current property's site/view, for example, Waterfront.

Important Note About System Fields

The system fields appear in ***bold-italics*** in the **Header field name** column. Most of these fields are NOT included in the list of header fields. These fields typically contain keyed ID codes or flags that determine how certain items will be linked. You should never edit these fields in the.CSV file.

Exporting Data

You can export contact, listing, closing, lead and referral records from Top Producer 7i to a standard comma-separated values (.CSV) file, which you can then import into other programs (for example Microsoft Outlook). This makes it easy to transfer your contact information from one program to another.

> **Note:** If you are an assistant or are part of a team or partnership account and the **Export data** menu item is unavailable, this indicates the responsible agent has not granted you export permissions. Contact the database owner for export rights.

To export contacts from Top Producer 7i:

1. From the main menu, point to **Setup**, **Data transfer / conversion**, then click **Export data...**.

   The *Export contacts* page opens.

2. Select an export option:

   - **Export all contacts** — select this option to export all contact, listing, closing, lead, and referral records.
   - **Search for contacts to export** — select this option to search for and select specific records for export.

3. Click **Next** to proceed.

   - If you selected **Export all contacts**, the *Export contacts to a file* page opens. Skip to step 6.
   - If you selected **Search for contacts to export**, the *Search contacts for export* page opens. Proceed to step 4.

4. From the *Search contacts for export* page:

   - perform either a Quick search or an Advanced search to specify the types of records you want to export. For more information, see *“Searching For Contacts” on page 175*.

- click **Display all** from the control menu to retrieve all records.

5. The *Contact search results for export* page is displayed with the results of your search.

    - Use the **Select all** link to highlight the entire list of records.
    - Hold down the **[Ctrl]** key and click on specific records to select multiple records from the list.
    - Click the **Search results total** link in the bottom right corner to get a count of how many records you have in the list.

6. Click **Next** to proceed.

7. From the *Export contacts to a file* page, select an export option:

    - **Export all columns** — choose this option to export all Top Producer 7i database columns.
    - **Select the columns for export** — choose this option to specify which columns you want to export. Double-click the columns you want to export from the **Columns available for export** grid (or select the respective columns and use the right arrow icon) to move them into the **Columns selected for export** section. The order you choose the columns in the **Columns available for export** section determines their order in the export file. Use the **Move up / Move down** links to change the order.
    - **Export search results columns only** — if you chose to search for the contact(s) you want to export in step 2, you can export only the three columns that were displayed on the *Contact search results for export* page (contact name, address and main contact number). This option will NOT be available if you chose to export ALL contacts.

8. Click **Start export**.

    The *Save exported file as...* pop-up window opens.

9. Select a location (for example, your desktop) and enter a name for the export file (the default format is a .CSV file). Click **Save**.

The *Exporting records to file* message box asks you to wait until the export process is complete.

10. Click **OK** in the *Export complete* dialog box to return to the main menu.

Troubleshooting

In this chapter:

Browser Setup

How to optimize your login time

Use the browser settings below to decrease the amount of time it takes Internet Explorer 5.0 to load Top Producer 7i. By choosing to automatically check for newer versions of stored pages and not emptying the cache each time you log off, you will experience faster logins, since Internet Explorer won't have to download all the files each time you connect.

Note: If you notice that you consistently have slow login times, please follow these additional steps, (see *"Consistently slow login times" on page 645*).

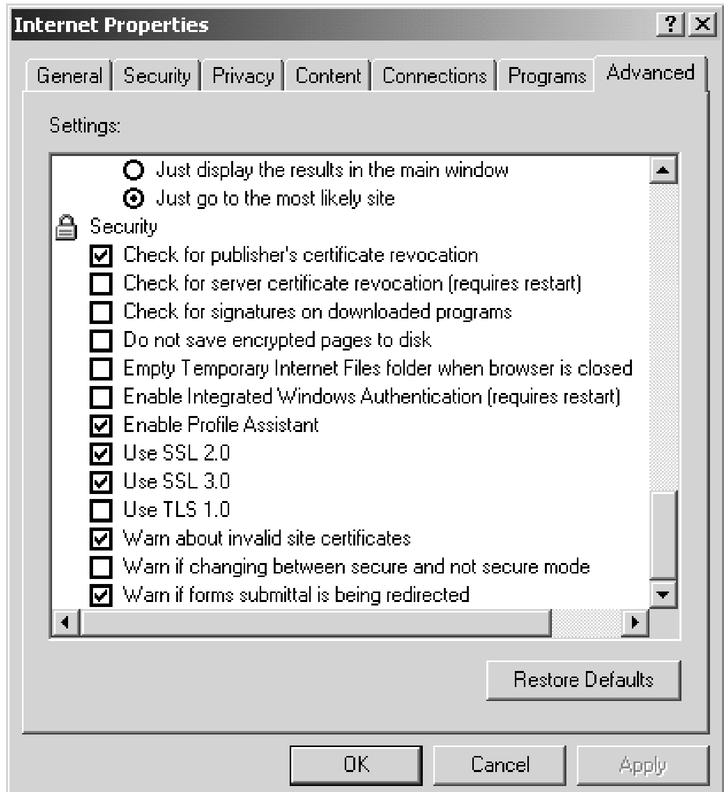
To change your browser settings:

1. Make sure your browser is closed.
2. From your desktop, click **Start**, **Settings**, then click **Control Panel**.
3. Double-click the **Internet Options** item from the list.

   The *Internet Properties* pop-up window opens.
4. Click the **General** tab.
5. In the **Temporary Internet files** section, click **Settings**.

   The *Settings* pop-up window opens.
6. Under the **Check for newer versions of stored pages** section, select the **Automatically** option button.
7. Click **OK** to exit the *Settings* pop-up window and return to the *Internet Properties* pop-up window.
8. Click the **Advanced** tab and scroll down to the **Security** section.

9. Ensure that the **Empty Temporary Internet Files folder when browser is closed** check box is NOT SELECTED. That is, the check box must be cleared.



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

11. Close the *Control Panel* window.

Consistently slow login times

To address consistently slow login times, please follow these steps.

Note: These steps need only be followed once.

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1. Close all open programs, including Internet Explorer.

2. If you are using Windows 95/98/ME/XP or 2000, click the **Start** button, then point to **Settings**, and then click **Control Panel**.

Note: If you are using Windows XP and the Category view is currently displayed, click the **Network and Internet Connections** link.

3. Select **Internet Options**.
4. Click the **Content** tab.
5. In the **Certificates** section complete the following:

   a) Click the **Publishers** button.

   b) Select **Top Producer Systems Inc.** in the **Trusted publishers** list, then click **Remove**.

Note: Repeat this step to remove all instances of **Top Producer Systems Inc.** from the list.

   c) Click **OK** to return to the *Internet Properties* pop-up window.

   d) Click **OK** to return to the **Control Panel**.

   e) Exit the **Control Panel** by clicking **File**, then **Close**.

6. Try logging in to Top Producer 7i.

   The *Security Warning* pop-up window opens, prompting you to allow content from Top Producer Systems Inc. to run.

7. Ensure the **Always trust content from Top Producer Systems Inc.** check box is enabled, then click **Yes**.

   The login should continue normally from here and you should see that subsequent logins are significantly faster.

Using the default security settings

Top Producer 7i is designed to work with Internet Explorer 5.0 or later, using the default browser security settings. If you change the default settings, Top Producer 7i may not work correctly. In the event that you have changed the default settings, please make sure that the following are used:

Internet Explorer 5.0 and higher:

1. From Internet Explorer (open a new browser window or use the Top Producer 7i *Login* window), click **Tools**, then click **Internet Options**.

2. Click the **Security** tab.

3. Click the **Internet** zone.

4. Select a security level other than **High**, or click **Custom Level**, scroll to the **Cookies** section, and then click **Enable** for both cookie options.

5. Click the **Advanced** tab.

6. Scroll to the **Security** section.

7. Select all of the “**Use SSL...**” check boxes.

8. Make sure the **Do not save encrypted pages to disk** check box is NOT selected.

9. Click **Apply**, then **OK**.

Internet Explorer 6.0:

1. From Internet Explorer (open a new browser window or use the Top Producer 7i *Login* window), click **Tools**, then click **Internet Options**.

2. Click the **Privacy** tab.

3. Make sure the **Settings** slider is NOT set to **Block all cookies**.

4. Click the **Advanced** tab.

5. Scroll to the **Security** section.

6. Select all of the “**Use SSL...**” check boxes.

7. Make sure the **Do not save encrypted pages to disk** check box is NOT selected.

8. Click **Apply**, then **OK**.

   If you see a message to notify you that a web site is trying to send you a cookie when you try to sign in, you should choose to continue or else you will not be able to sign in.

If you see a message to notify you that you are entering or leaving a secure connection when you try to sign in, you should choose to continue or else you will not be able to sign in.

If you are behind a firewall or proxy that does not support secure connections (for example, if you are accessing the Internet from a computer that is part of a corporate network), speak with your local system administrator to see if a solution can be reached using your network. Note that not all firewalls or proxies cause errors.

When you are unable to log in

If you are unable to log in to Top Producer 7i due to a technical issue or version conflict with your web browser, follow these steps before contacting Technical Support.

- Reset your security settings to the default settings.
- Add https://www.topproduceronline.com to Internet Explorer's list of trusted sites.
- Delete all temporary Internet files.

Resetting Your Security Settings to Default

1. From Internet Explorer (open a new browser window or use the Top Producer 7i *Login* window), click **Tools**, then click **Internet Options**.
2. Click the **Security** tab.
3. Click the **Internet** zone.
4. Click the **Custom Level** button.

   The *Security Settings* pop-up window opens.
5. In the **Reset custom settings** section (near the bottom of the pop-up window), click the **Reset to:** drop-down list and select **Medium**.
6. Click the **Reset** button.

   The *Warning* dialog box opens asking if you want to proceed with changing your security settings for the zone.
7. Click **Yes**.
8. Click **OK**.

   You are returned to the *Internet Options* pop-up window.

Adding the Top Producer URL to the List of Trusted Sites

1. Click the **Trusted sites** zone.
2. Click the **Sites** button.

   The *Trusted sites* pop-up window opens.
3. In the **Add this Web site to the Trusted zone** text box, type **https://www.topproduceronline.com**, then click **Add**.

   The URL is displayed in the **Web sites** list box.
4. Click **OK**.

   You are returned to the *Internet Options* pop-up window.

Deleting All Temporary Internet Files

This procedure is safe to perform and only deletes the temporary files and history that are created by Internet Explorer when you browse web sites.

1. Click the **General** tab.
2. Under **Temporary Internet files**, click the **Settings** button.

   The *Settings* pop-up window opens.
3. Under **Check for newer versions of stored pages**, click the **Automatically** option button.
4. Click the **View Files** button.

   The *Temporary Internet Files* browser window opens showing you a list of all temporary files contained in the folder.
5. From the main menu of the *Temporary Internet Files* window, click **Edit**, then **Select All**.
6. Press the **[Delete]** key on your keyboard.

   A *Warning* dialog box opens asking if you want to proceed with deleting the selected cookies.
7. Click **Yes**. In a moment all of the temporary Internet files are deleted.

8. Close the *Temporary Internet Files* window.

9. Click **OK** to close the *Settings* window. You are returned to the **General** tab.

10. Under the **History** section, click the **Clear History** button.

    An *Internet Options* dialog box opens asking if you want to proceed with deleting your history of all visited web sites.

11. Click **Yes**.

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

13. Ensure the **Empty Temporary Internet Files folder when browser is closed** check box is NOT SELECTED. That is, the check box must be cleared.

14. Click **OK**.

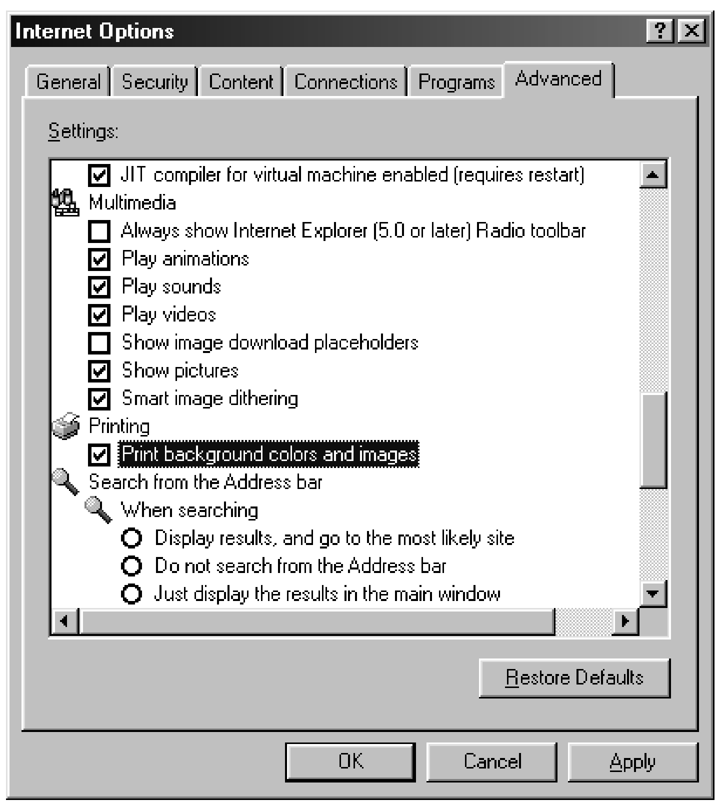
    The *Internet Options* window closes.

15. Restart your computer and try logging in to Top Producer 7i again. If the issue persists, then contact Technical Support.

Printouts do not print correctly

If your printouts are not printing correctly, do the following:

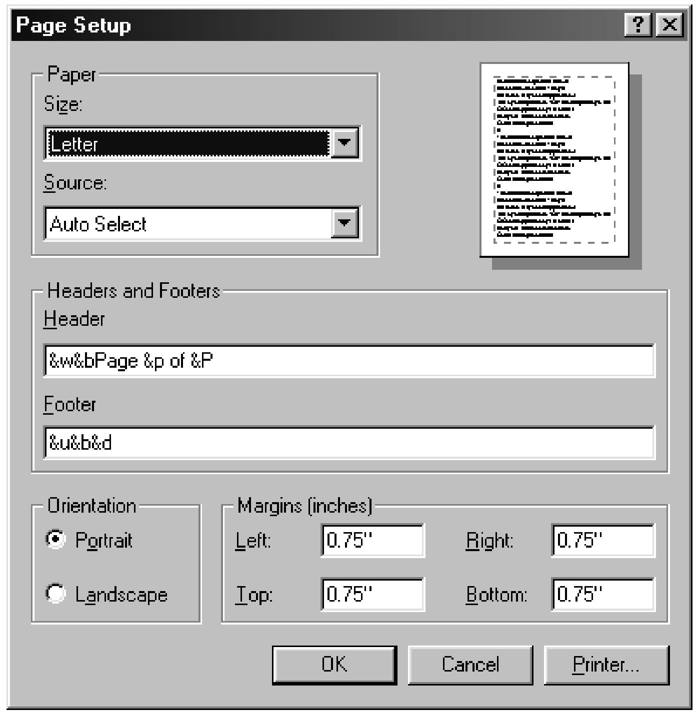
1. From Internet Explorer (open a new browser window or use the Top Producer 7i *Login* window), click **Tools**, then click **Internet Options**.
2. Click the **Advanced** tab.
3. Scroll down the list to the **Printing** section.
4. Select **Print background colors and images**.
5. Select **Apply**, then click **OK**.



6. Click **File**, then **Page setup**.

7. Make sure that the *Page setup* settings match the following settings, then click **OK**.

    - **Size:** Letter
    - **Orientation:** Portrait
    - **Margins:** 0.75”



8. Log out of Top Producer 7i and log back in again. You should be able to print correctly now.

Resetting Passwords

Access the *Reset password* page by browsing to https://www.topproduceronline.com and clicking **Did you forget your password?**.

Importing Top Producer desktop data using Windows 2000

If you are using Microsoft Windows 2000, you must have at least Service Pack 2 installed to be able to import Top Producer desktop data. Go to the Microsoft Windows 2000 Web page (http://www.microsoft.com/windows2000) and download and install Service Pack 2 or later.

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

Contacting Technical Support

Top Producer Technical Support is available as follows:

Monday - Friday, 6:00 AM - 5:00 PM (Pacific Time)

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

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