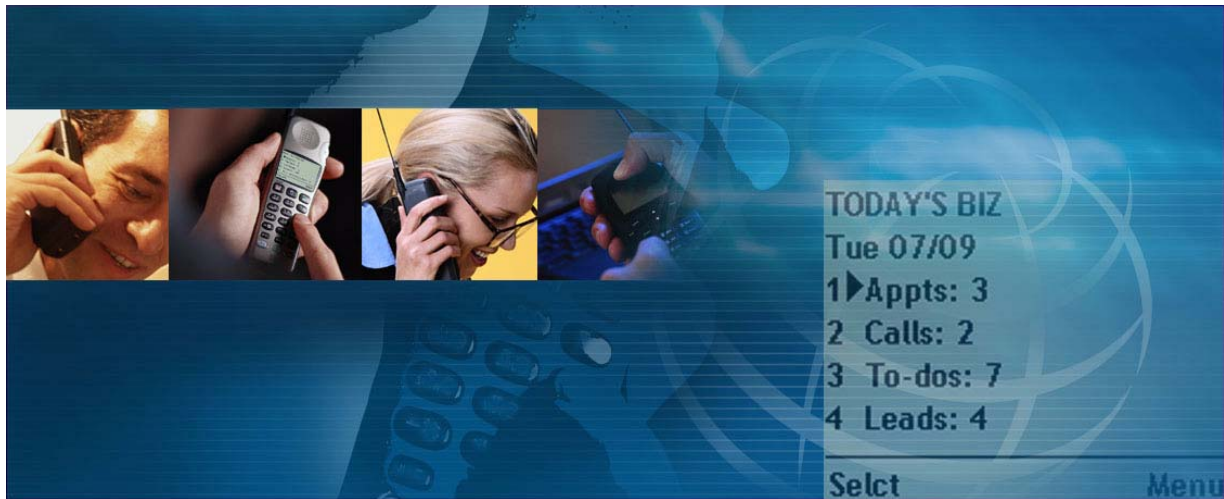


Top Producer[®] SellPhone

Quick Setup



Top Producer Systems
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Top Producer SellPhone Quick Setup

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Introduction

In this chapter:

- *“What Is Top Producer SellPhone?” on page 5*
- *“About Wireless Internet Services” on page 5*
- *“Top Producer 7i System Requirements” on page 6*
- *“About This Quick Setup Guide” on page 7*
- *“Contacting Technical Support” on page 10*

What Is Top Producer SellPhone?

Welcome to Top Producer SellPhone! Top Producer SellPhone allows you to access your Top Producer 7i email, contacts, activities, listings, closings and leads from wherever wireless Internet service is available. All you need is an Internet-enabled mobile phone or a BlackBerry® handheld device.

About Wireless Internet Services

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

Top Producer 7i System Requirements

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

About This Quick Setup Guide

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

Top Producer SellPhone Quick Setup:

- Provides you with information on how to access our other helpful references, including the Top Producer SellPhone User Guide and information on how to contact Technical Support for assistance.
- Tells you how to set up Top Producer SellPhone including how to assign a license, log into the program using your phone and setting feature preferences.

About Portable Document Format (PDF)

Top Producer SellPhone Quick Setup is presented in Portable Document Format, and is viewed by using Adobe® Acrobat® Reader®.

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

Printing this Quick Setup guide

If you prefer, you can choose to print this guide.

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

The *Print* pop-up window opens.

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

Saving this Quick Setup guide to your hard drive

It is recommended that you save Top Producer SellPhone Quick Setup to your desktop, although you can save it to any directory on your hard drive. To view the saved guide, double-click the file to open it in Adobe Acrobat.

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

To save this guide to your computer:

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

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

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

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

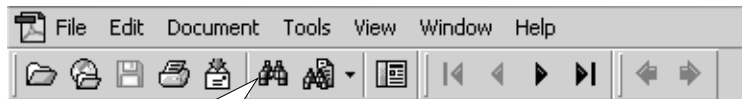
To access the guide quickly, it is recommended to save it to your desktop.

Searching for specific information

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

To search this document using Adobe Acrobat:

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



To search through this guide for specific information, click the **Find** icon.

The *Find* pop-up window opens.



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

2. In the **Find What** field, type a key word. For example, if you're looking for information about using the BlackBerry® handheld device, type "Blackberry".
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 Quick Setup 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 "[Setting SellPhone Preferences](#)", click the blue colored text to go directly to that section in the document.

Additional materials

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

To access the Top Producer SellPhone User Guide:

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

The *Download User Guides* topic opens.

2. Under the **Top Producer SellPhone** heading in the table, click **User Guide**.

The *Top Producer SellPhone* User Guide opens.

Contacting Technical Support

Before contacting Technical Support, please see the Top Producer SellPhone User Guide.

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

Email: support@topproducer.com

Toll-free: 1.800.830.8300

Fax: 604-270-6365

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

Setting Up Top Producer SellPhone

In this chapter:

- *“Checklist For Getting Started” on page 12*
- *“Assigning a Top Producer SellPhone License” on page 13*
- *“Logging On For The First Time” on page 15*
- *“Setting SellPhone Preferences” on page 17*

Checklist For Getting Started

To use Top Producer SellPhone, you will require a Top Producer SellPhone license, and an Internet-enabled mobile phone (or a BlackBerry Handheld device). In addition, your cellular provider must support wireless Internet connections.

The following steps are required in order to set up Top Producer SellPhone:

1. Assign a Top Producer SellPhone license from Top Producer 7i (see [page 13](#)).
2. Use your phone's micro browser to log on for the first time (see [page 15](#)).

Please contact your cellular provider for assistance with setting up short message service (SMS) on your phone. You can use this feature to be notified of new leads.

To purchase a license for Top Producer SellPhone, either contact our Sales Department at 1-800-241-5309, or use the Subscription Manager in Top Producer 7i. To learn more about using the Subscription Manager, see the Top Producer 7i User Guide.

Assigning a Top Producer SellPhone License

The first step is to be sure you have been assigned a Top Producer SellPhone license from the *Agent setup* page in 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. Under **Additional Top Producer applications**, select the **Top Producer SellPhone** check box.

Note: You may have to scroll down to see the **Additional Top Producer applications** section on the page.

3. Click **OK**.

Assigning a license to an assistant

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

The instructions below assume you have already set up an assistant. If you have not and you would like to learn more, please see Top Producer 7i's online Help or User Guide.

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

The *Agent information* page opens.

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

Note: If you do not have an assistant set up, this action menu item will not be available.

The *Assistants* page opens.

3. Highlight an assistant in the list and click **View or edit** from the action menu.

The *Assistant information* page opens.

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

Logging On For The First Time

If you need assistance with starting your phone's micro browser, please contact your cellular provider.

When you log on to Top Producer SellPhone for the first time, you must enter both your username and password. On subsequent log ons, depending on your cellular provider and the setup preferences you choose, you may only need to enter your password. For more information on setting preferences, see ["Setting SellPhone Preferences" on page 17](#).

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

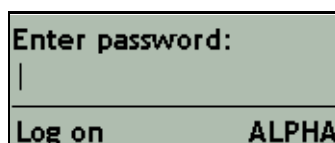
1. Connect to the wireless Internet using your phone's micro browser.
2. Go to **tpsellphone.com**.

The *Enter username* screen opens.

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

To learn more about adding bookmarks, see the Internet Explorer online help.

3. You can bookmark the *Enter username* screen so you do not have to enter the Top Producer SellPhone web site address every time you log on. The next time you want to log on, go directly to the bookmark.
4. Enter your Top Producer username and select **Next**.
5. Enter your password and select **Log on**.



The main menu appears.

To log off Top Producer SellPhone or change users:

1. From the main menu, simply select **Log off**.

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

2. Your phone is free to let another user log on.

Setting SellPhone Preferences

You can customize the way you log into Top Producer SellPhone, which screen is displayed when you log in, and how contacts, activities and other lists are displayed on your phone.

To do this, you must log into Top Producer 7i.

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

To access Top Producer SellPhone preference settings:

1. Using a web browser, go to <https://www.topproduceronline.com> and log in to Top Producer 7i using your username and password.
2. From the Top Producer 7i main menu, point to **Setup, Applications setup**, and then click **Top Producer SellPhone**.

You can find out how to use these tab settings in the Top Producer SellPhone User Guide.

SellPhone™ preferences

Application settings

Startup screen: [Dropdown]
 Main menu: [Dropdown]
 Authentication rule: [Require password only]
 Phone type priority for auto-dialing:
 Business
 Fax
 Home
 Mobile
 Other
 Pager

Show 'Delete' confirmation
 Show 'Success' screens

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

Enable Lead Alerts

Cell phone number

Area code: [604] Number: [2095957] Wireless service provider: [Rogers AT&T] [Send test message](#)

The page is divided into two parts, the **Application settings** section at the top; and a series of tabs in the bottom of the page.

Note: You can set preferences for lead alerts, phone numbers, contacts, activities, emails, displays of lists and views, and listing and closing details. For more information refer to the SellPhone Preferences section of the Top Producer SellPhone User Guide.

3. If you want to revert the preference settings back to their initial default values, click **Restore all defaults** from the action menu.
4. Once you have finished changing your settings, select **OK** to save.

Setting up lead alerts

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

Please contact your cellular service provider to:

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

Once you have done this, do the following:

1. Log on to Top Producer 7i. Using a web browser, go to <https://www.topproduceronline.com> and log in using your username and password.
2. Once you have logged in to Top Producer 7i, point to **Setup, Applications setup**, then click **Top Producer SellPhone**.
3. Click the **Lead Alerts** tab.
4. Select **Enable Lead Alerts**.
5. Enter your cell phone's three digit area code in the **Area code** field.

6. Enter your cell phone's seven digit phone number in the **Number** field.
7. Click the **Wireless service provider** drop-down list and select your wireless provider. If your wireless provider is not listed, select **Other** from the list.
 - If you select **Other**, the *Email address for notification* field becomes available.
 - Enter the email address used to send messages to your phone.
8. To send a test message to your phone, click the **Send test message** link and ensure your phone is turned on.

A test message is sent to your phone, reading "Test message from Top Producer SellPhone".

Setting up email

In order to send email messages to your contacts from your mobile phone, you must first set up your own outgoing email address in Top Producer 7i.

Note: The first time you use this application, follow the procedure below, to set up your email preferences.

To set up your email address in Top Producer 7i:

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

The *Email configuration* page opens.

2. Select one of the following options:
 - **I want to use an email account in the @topproducer.com domain** — enter a username, then click **OK**. The *Email set up* dialog box opens telling you if the setup was successful. Click **OK**.
 - **I want to use existing POP3 email accounts** — select this option to use your existing personal or business POP3 accounts (excluding Web-based email systems such as AOL or Hotmail), and click **OK**. The *Add a new account* page opens. Enter the required information, then click **OK**.

- **I do not want to send or receive email using the My email feature** — if you select this option, any existing email messages you may have in the Inbox will be deleted. Click **Yes** to continue."

For more information, see the Top Producer 7i User Guide.

Customizing your login procedure

The **Authentication rule** setting on the *SellPhone preferences* page lets you choose how you prefer to log into Top Producer SellPhone on your mobile phone.

You must log into Top Producer SellPhone at least once using both username and password before a new setting comes into effect.

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

To set up your Top Producer SellPhone log in procedure:

1. From the *SellPhone preferences* page in Top Producer 7i, click the **Authentication rule** drop-down list and choose one of the following options:
 - **Require username and password** — this setting requires you to enter your username and password every time you log into Top Producer SellPhone. This setting provides maximum security.
 - **Require password only** (default) — this setting requires you to enter only your password. Your username is automatically retrieved when you log in. This setting provides good security with more convenience.
 - **PIN code only** — this setting requires you to enter your Personal Identification Number (PIN) code number each time you log in. This setting provides good security with more convenience.
 - **No username or password** — this setting does not require you to enter anything. Your username and password are automatically retrieved whenever you log in. This setting provides less security but is most convenient.

2. Click **OK** to save your settings.

Note: More information can be found on the series of tabs on the *SellPhone preferences* page in the "SellPhone Preferences" section of the Top Producer SellPhone User Guide.

Using Top Producer SellPhone

In this chapter:

- *“How To Use An Internet-Enabled Mobile Phone” on page 23*
- *“How To Use A BlackBerry Handheld Device” on page 25*
- *“Top Producer SellPhone Basics” on page 26*

How To Use An Internet-Enabled Mobile Phone

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



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

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

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

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

5 jkl

When Top Producer SellPhone requires text input, repeatedly pressing one of these keys will generate the corresponding letter. For example, press the **5** key once to enter **j**, twice for **k** and three times for **l**. For more, see [“Entering text” on page 28](#).

END

Most phones have a hard **Back** key, which may be labelled **BACK**, **END**, or something else depending on the particular model of phone (refer to your phone manual). You can use this key to move to previous screens. For more information, see [“Back” on page 27](#).

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

CLR

Use the **CLR** button to delete characters. Some phones may not have a **CLR** button. For more information, see your phone’s user guide.

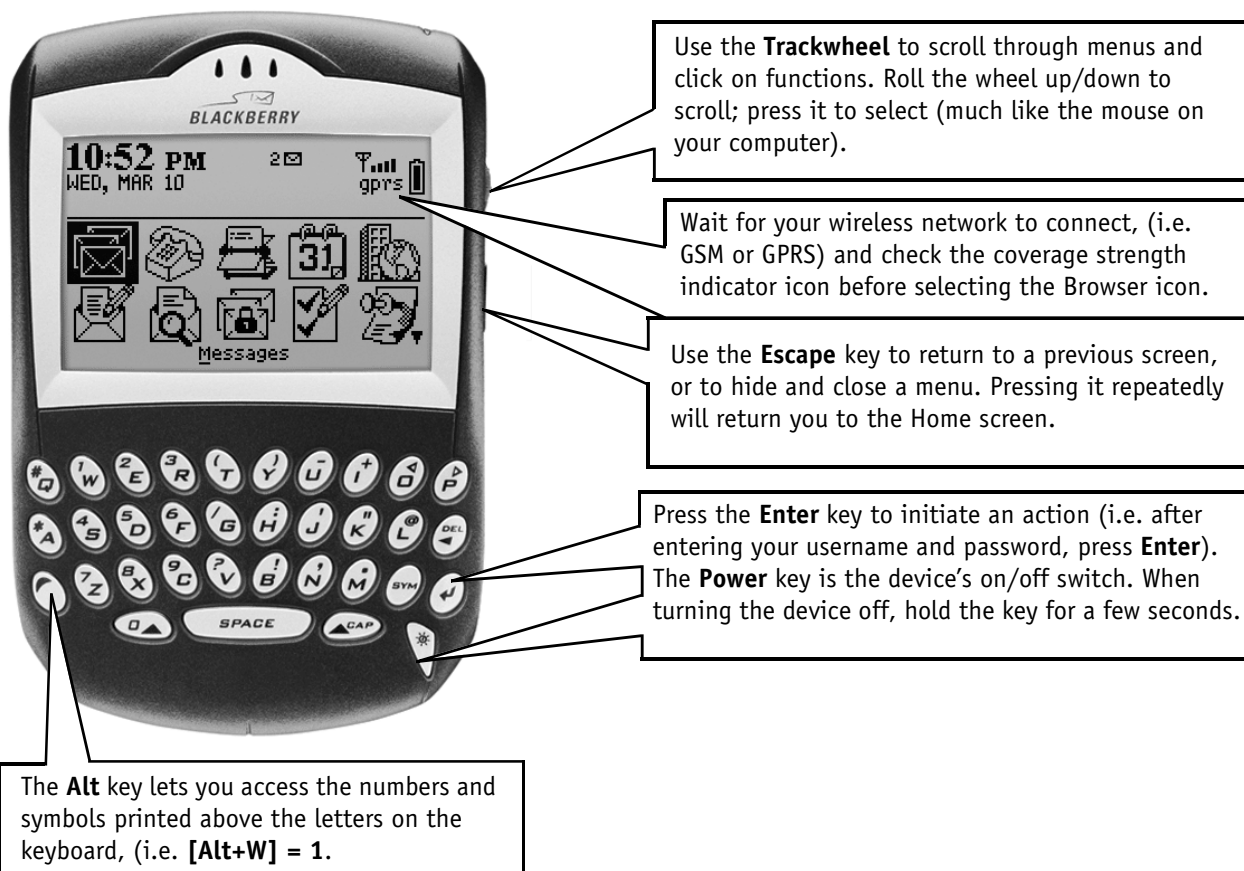


Use the **scroll keys** to navigate the screens. Some phones have 4 scroll keys, some have only 2. In Top Producer SellPhone, you only use the **Up** and **Down** scroll keys to navigate the screens.

How To Use A BlackBerry Handheld Device

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

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

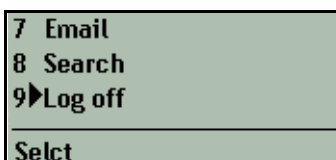
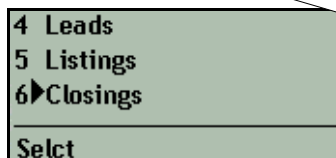
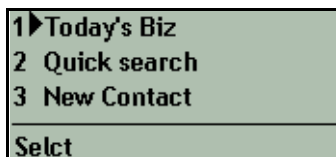


Top Producer SellPhone Basics

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

- scrolling around the screen (see below).
- selecting menu options (see [page 27](#)).
- navigating screens and lists (see [page 27](#)).
- entering text (see [page 28](#)).
- entering dates and times (see [page 28](#)).
- dialing a contact from a Top Producer SellPhone screen (see [page 28](#)).
- the main menu (see [page 29](#)).

Screen size

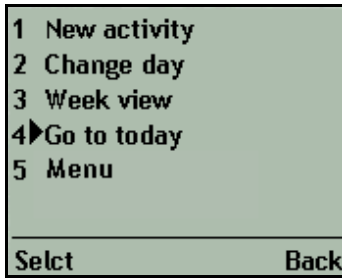


Most wireless Internet phones can only display a few lines of text at a time. Use the **Up** and **Down scroll keys** to access options that are hidden by the edges of the screen.

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

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

Selecting menu options



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

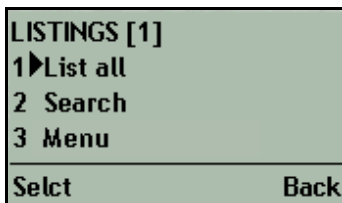
You can select an option in two ways:

- Press the corresponding number on the keypad (for example, press **4** for **Go to today** in this example). Some menu options (for example those above 9) may not have a quick-access key.
- Use the **scroll keys** to move the cursor to the appropriate selection, then press the **left Soft key (Selct)** to select it.

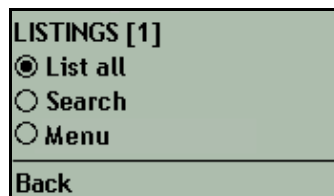
Note: When using Top Producer SellPhone on a BlackBerry handheld device, there may be only one Soft key available in many instances. You can select an option by using the **Trackwheel** and the pop-up menu.

Navigating screens and lists

Back

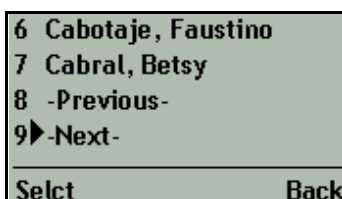


Use the **Back** Soft key or menu item, when available, to go to a previous screen. Most phones also have a key which can be used to go back to previous screens. This key may be labelled something like **"BACK"**, **"END"**, or **"CLR"**. Press this phone key repeatedly to go back to previously viewed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



Note: When using Top Producer SellPhone on the BlackBerry handheld device, as seen in the screen to the left, there is only one Soft key available. To select an item from the list, press the **Trackwheel** and use the pop-up menu.

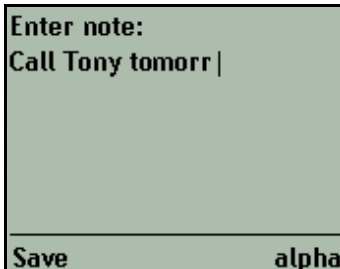
- Next- and - Previous-



If a list (for example the results of a search) contains more than one page, use the **-Previous-** and **-Next-** options to navigate through the list.

Note: Pressing **Back** will not move back in the list, but will return you to the previous screen.

Entering text



Your micro browser supports a number of different text-entry modes. How you select these modes depends on the model of phone you have. Please refer to your phone's user guide for more information.

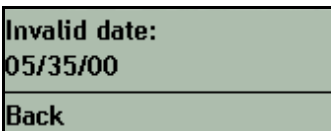
- **Alpha** or **ABC** — Text entry mode.
- **NUM** — Only numbers will be entered.

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

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

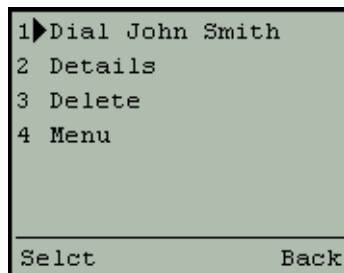
To enter special symbols, keep pressing the *****, **0** or **1** key until the symbol you need appears. For more information, see your phone's user guide.

Entering dates and times



All dates are entered in the **mm/dd/yy** format. All times are entered in the **hh:mm AM/PM** format. You do not have to enter the slashes (/); Top Producer SellPhone will automatically enter them for you. If you enter an invalid date or time, you will see the *Invalid date/Invalid time* screen. Select **Back** and re-enter the date or time.

Dialing contacts



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

The Main menu

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

To learn more about the following features, see the Top Producer SellPhone User Guide.

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

- **Today's Biz (Today's Business)** — display your activities for today, or schedule an activity.

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

- **Quick search** — quickly look up a contact by name.
- **New Contact** — add a new contact.
- **Leads** — search for, view, or call your leads.
- **Listings** — search for and view your listings and property information.
- **Closings** — search for and view your closings and property information.
- **Email** — send and receive email.

Note: If you have not set up your email preferences in Top Producer 7i, you will not be able to send or receive email. Log into Top Producer 7i, point to **Email**, and then click **My Email**. To learn more about setting up email, see the Top Producer 7i Quick Setup.

- **Search** — search for contacts using a number of criteria, or list all your contacts.
- **Log off** — log out of Top Producer SellPhone. Remember to quit your micro browser to avoid unnecessary cellular service charges.

About sessions

Your session has expired.

Logon

Whenever you log on to Top Producer SellPhone, a new session is created. As you use Top Producer SellPhone it will remember where you are and what you are doing. If you need to make or receive a phone call you can disconnect from your micro browser, or if you are inactive for a period of time you may be automatically disconnected. When you reconnect to Top Producer SellPhone you will be returned to the same screen where you disconnected from.

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