

Top Producer for Windows Mobile Quick Setup

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Getting Started

In this chapter:

- *"What is Top Producer for Windows Mobile?" on page 2*
- *"About this Guide" on page 3*
- *"Contacting Technical Support" on page 4*

What is Top Producer for Windows Mobile?

Top Producer for Windows Mobile gives you access to your online Top Producer data any time, anywhere, with the portability of your handheld.

You can store listings, closings, contacts and leads on your handheld. You can also organize follow-up calls, appointments and to-dos with **Today's Activities**.

Synchronization technology ensures that the changes you make on your handheld (e.g. new contacts and new listings) are transferred into your online database after you perform a synchronization, and that changes made to the online database are transferred to the handheld.

About this Guide

This guide is in Portable Document Format (PDF), and is viewed using Adobe® Acrobat® Reader®.

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

How to Print the Guide

To print the guide:

- 1 From the **File** menu, click **Print**.
- 2 From the **Print** dialog box, set your printer options.
- 3 Click **OK**.

Navigating Within the Guide

If you are reading the guide online as a PDF file, click any text that appears in blue to jump directly to that section, (for example, click on ["Installing from Top Producer 7i" on page 8](#)).

Contacting Technical Support

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

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

Before You Start Installing

- *“System Requirements” on page 6*
- *“Checklist for Getting Started” on page 7*

System Requirements

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

Memory

- Minimum 128 MB recommended

Computer operating system

- Windows 2000, XP or Vista

Internet browser

- Internet Explorer 6.0
- Top Producer 8i-related functions require Internet Explorer 7.0 or Firefox 2.0

Synchronization Software

- For Windows operating systems prior to Vista: ActiveSync 4.0 or higher
- For Windows Vista: Windows Mobile Device Center

Handheld operating system

- Windows Mobile 5.0 (Pocket PC and Pocket PC Phone Editions)

Checklist for Getting Started

To set up Top Producer for Windows Mobile, ensure the following:

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

Note: For instructions on how to connect your handheld to your computer, refer to the instructions that came with your handheld.

Installing from Top Producer 7i

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- *“Step 2 - Set up Filters for Data Sent to the Handheld” on page 11*
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- *“Step 5 - Start up Top Producer for Windows Mobile” on page 18*

Step 1 - Assign a License

Follow these steps to make sure that you have been assigned a Top Producer for Windows Mobile license in Top Producer 7i.

To assign a license to an agent:

- 1 From Top Producer 7i's **Setup** menu, click **Agent setup**.

The *Agent information* page opens.

- 2 In the **Additional Top Producer applications** section, select **Top Producer for Windows Mobile**.

The displayed agent now has a Top Producer for Windows Mobile license.

- 3 Click **OK**.

To assign a license to an assistant:

Follow these steps if you purchased more than one license and want to assign a license to an assistant who also has a handheld device.

- 1 From the **Setup** menu in Top Producer 7i, click **Agent setup**.
- 2 From the *Agent information* page, click the **Assistants** action item on the left side of the screen.

The *Assistants* page opens.

Note: If you don't see your assistant's name in the list, you will need to add their information. For more information on creating assistants, see Top Producer 7i Quick Setup.

To purchase an assistant license, contact our Sales Department at 1-800-241-5309.

- 3 Select the assistant and then click the **View or edit** action item.

The *Assistant information* page opens.

- 4 In the **Login information** section, select **Top Producer for Windows Mobile** from the drop-down list and click **OK**.

The displayed assistant now has a Top Producer for Windows Mobile license.

Step 2 - Set up Filters for Data Sent to the Handheld

Set up filters to control which records are sent to your handheld. Doing this will speed-up your handheld's response time and limit the size of your database, making all of your synchronizations faster.

Setting up a Filter

To set up a filter:

- 1 From the Top Producer 7i **Setup** menu, select **Applications setup > Top Producer 7i for handhelds**.
- 2 Click the **Filter** action menu item.
- 3 From the *Filter for current device* screen, define the filter settings you want to use for your device.

For a complete listing of the fields available and how to use them, see the "Setting Up Filters to Control What Data is Sent to the Handheld" topic in the 7i online help.

- 4 By default, contacts and leads are only selected if they meet *all* of the filter conditions. If you have specified more than one filter condition and you want contacts to be selected that meet *any* of the conditions:

a) Click the **All** link to the right of the **Contacts and Leads** grid.

Note: This option is only available if you have more than one contact/lead filter set up.

b) From the *Filter group rule* dialog box, select **contact matches at least one condition** and click **OK**.

The **All** link changes to **Any**. Now contacts will be sent to the handheld if they match any one of the specified filter conditions.

- 5 When finished specifying your filter settings, click **OK**.

Step 3 - Install the Software

The following instructions assume you have the minimum system requirements installed. For more information, see [“System Requirements” on page 6](#).

To install Top Producer for Windows Mobile:

- 1 Use the USB slot to connect your device to the computer.
- 2 From the **Setup** menu in Top Producer 7i, select **Applications setup > TOP PRODUCER 7i for handhelds**.

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

- 3 Select the **Windows Mobile Handheld** radio button and then click **OK**.
- 4 From the *Handheld manager*, select the link to download the Windows Mobile handheld client software.

The *File Download* dialog box appears.

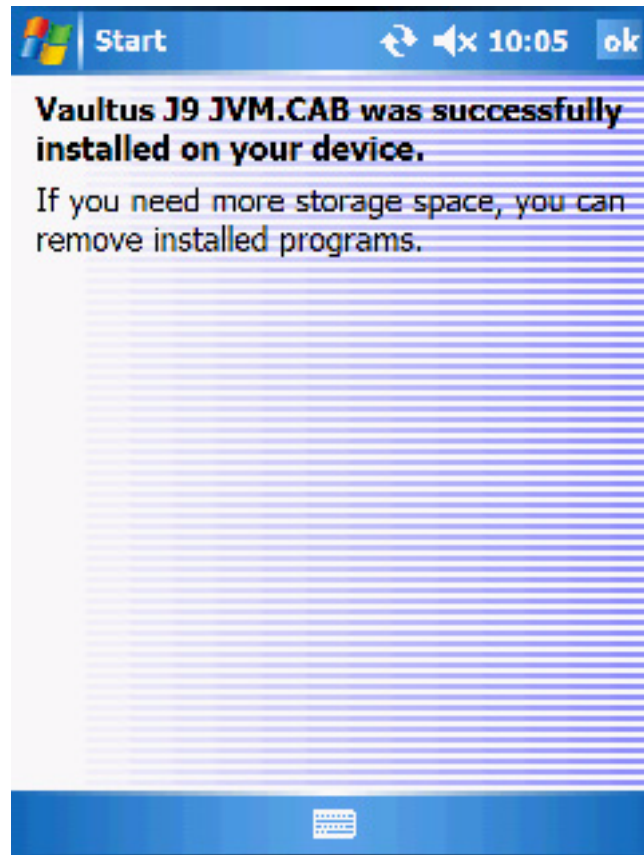
- 5 Click **Run**.
- 6 When the *Security Warning* dialog box appears, click **Run**.
- 7 Follow the on-screen prompts to install the software.
- 8 When the desktop installation is finished, a message will appear stating that the application will be installed on the next device connection. Click **OK**.

Note: If you are using an expansion memory card, you will be asked whether you wish to install to the handheld's base memory or to the expansion card. Only choose the latter if you are using a high-speed expansion card.

Important: You must install all of the files in just one of the two memory locations. If you don't do this - e.g. you install one file in the

handheld's base memory and the other two in the expansion card - Top Producer for Windows Mobile will not run.

- 9 When the handheld installation finishes, the following message appears:



- 10 Click **OK** to continue.

Top Producer for Windows Mobile is now installed on your handheld.

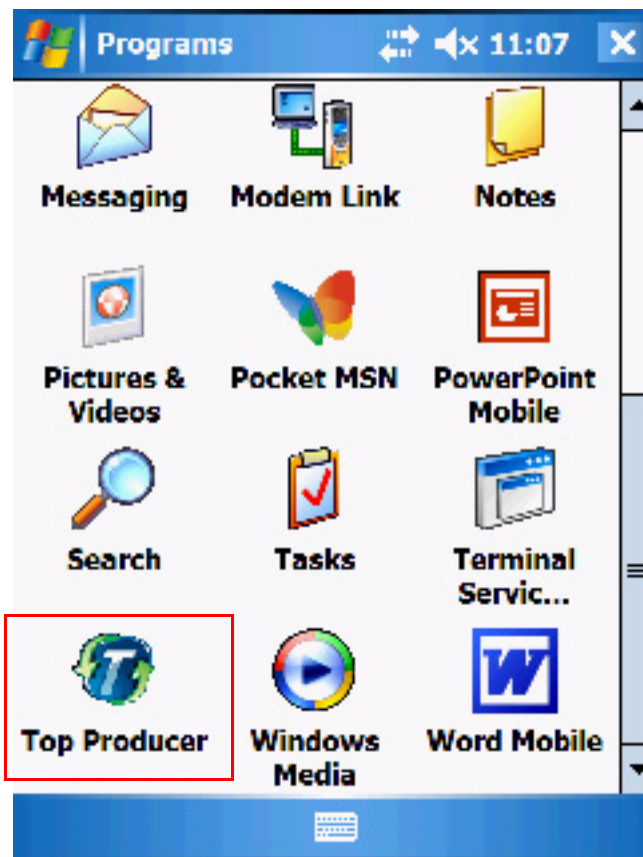
Step 4 - Download Data onto your Handheld

Downloading your Data

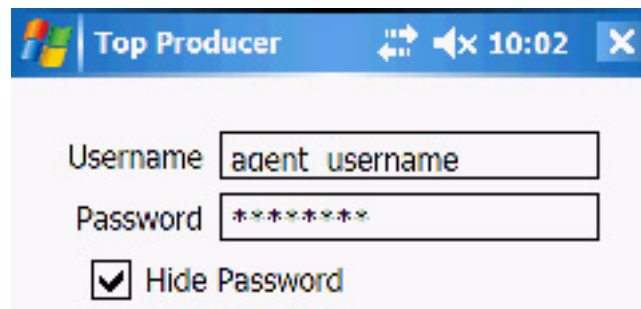
The first time you log onto Top Producer for Windows Mobile you will want to download your Top Producer 7i data onto your handheld.

To download Top Producer 7i data onto your handheld:

- 1 Connect your handheld to your computer via the USB port.
- 2 From the main screen's **Start** menu, select **Programs**. The **Launch Pad** will appear.

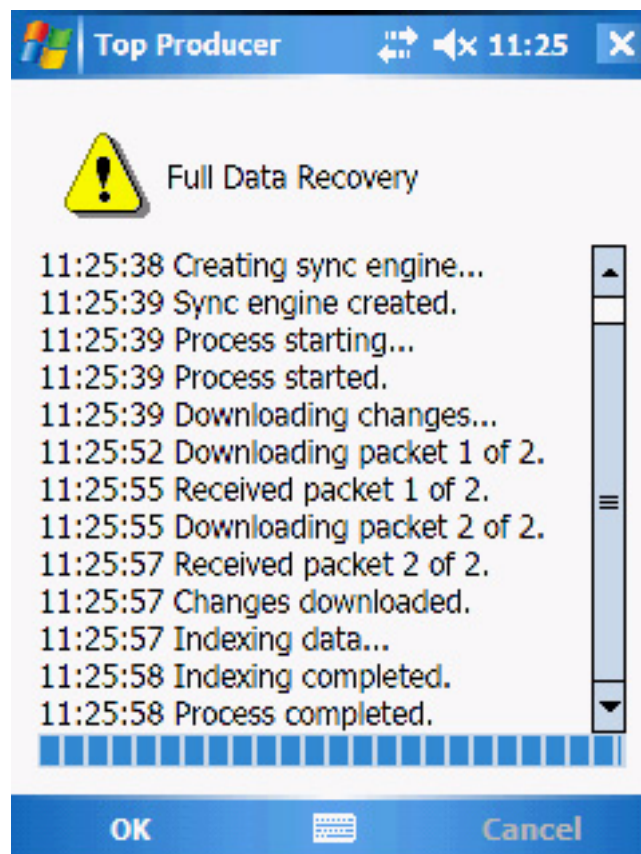


- 3 Tap the Top Producer icon. If this is the first time you've used Top Producer for Windows Mobile, you'll see a message asking you to log into Top Producer 7i to download your data.
- 4 Click **Yes** and the *Login* screen will appear.



- 5 Enter your Top Producer 7i username and password, then click **Connect** at the bottom left.

The message "connecting, please wait" will appear followed by "login successful." The FDR sequence will now proceed, displaying the sequence of messages shown below.



- 6 When this completes, click **OK**. The Top Producer for Windows Mobile screen will open and display your downloaded data.

Note: Depending on the size of your database and the way your filters are configured, FDR can take between 5 minutes to one hour to complete.

A Note for Windows Vista Users

If you are using Windows Vista and the FDR fails, displaying the message **Error 103**, please perform the following:

To redo FDR after receiving Error 103

- 1 From the Vista main screen, go to **Start > Control Panel > Windows Mobile Device Center**.
- 2 Click **Mobile Device Settings** and then **Connections Settings**. The **Connections Settings** screen opens.
- 3 From the **This computer is connected to** drop-down menu, select either **Work Network** or **The Internet**, then press **OK**.
- 4 Confirm that your Windows Mobile device is connected by viewing the bottom left corner of the Windows Mobile Device Center screen and confirming that the Connection status displays **Connected**.
- 5 If your mobile device is connected, restart the FDR process from Step 2 above. If not, contact Top Producer Technical support.

Step 5 - Start up Top Producer for Windows Mobile

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

Logging on from the Start Menu

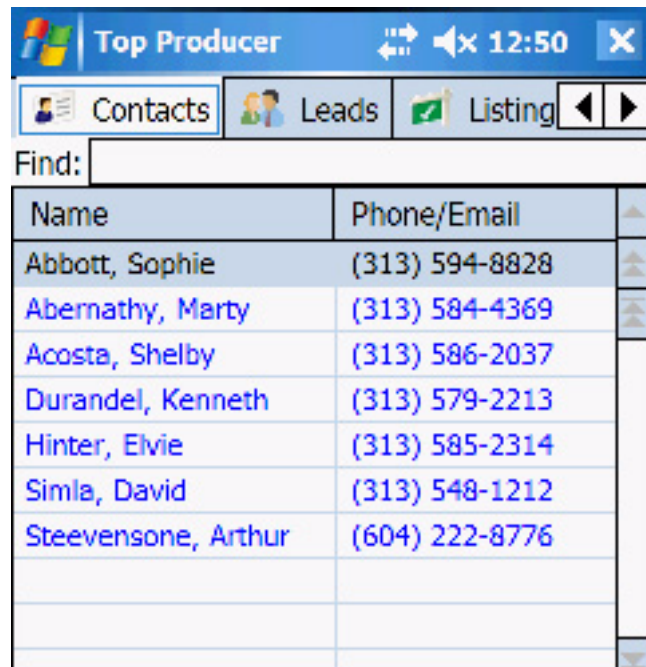
To log onto Top Producer for Windows Mobile from the Start menu:

- 1 From the main screen's **Start** menu, select **Top Producer**.

The message **Initializing Top Producer** will appear. After this, the home screen will appear, displaying tabs for each object (e.g. **Contacts**, **Leads**, and **Closings**).

Note: We recommend that you keep Top Producer for Windows Mobile running constantly, and then shut it down at the end of the day.

While it is running, you can access other applications (such as PowerPoint) from the Start menu. To return to Top Producer from another application, click the Start menu's Top Producer icon.



The screenshot shows the Top Producer mobile application interface. At the top, there is a blue header bar with the Windows logo, the text "Top Producer", and system icons for signal strength, volume, and time (12:50). Below the header, there are three tabs: "Contacts" (selected), "Leads", and "Listing". A "Find:" search bar is located below the tabs. The main content area displays a table of contacts with two columns: "Name" and "Phone/Email". The table contains seven rows of contact information.

Name	Phone/Email
Abbott, Sophie	(313) 594-8828
Abernathy, Marty	(313) 584-4369
Acosta, Shelby	(313) 586-2037
Durandel, Kenneth	(313) 579-2213
Hinte, Elvie	(313) 585-2314
Simla, David	(313) 548-1212
Steevensone, Arthur	(604) 222-8776

Installing from Top Producer 8i

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- *“Step 2 - Define a Filter and Install the Software” on page 22*
- *“Step 3 - Download Data onto your Handheld” on page 25*
- *“Step 4 - Start up Top Producer for Windows Mobile” on page 29*

Step 1 - Assign a License

Follow these steps to make sure that you have been assigned a Top Producer for Windows Mobile license in Top Producer 8i.

To view your active licenses:

- 1 From the **Utility menu** of Top Producer 8i, click **My Account**.
- 2 The header of the *My Account* screen displays every active license you have for your Top Producer account. **Top Producer for Windows Mobile** should be present.
- 3 If no license is present, contact Top Producer. If you are a part of a Broker account, contact your Responsible Agent.

To assign a license to an assistant:

Follow these steps if you purchased more than one license and want to assign a license to an assistant who also has a handheld device.

- 1 From the **Utility menu** of Top Producer 8i, select **My Account**.
- 2 Select the Team Members tab.
- 3 Click on the assistant's name in the Assistants table.
- 4 Click the **Edit Assistant Info** link in the bottom left.
- 5 From the **Assign Licenses and Feature Access** fieldset, select the **Give the assistant access to** check box and select **Top Producer 8i for Windows Mobile** from the drop-down list.
- 6 Click the **Save Assistant Info** button.

Step 2 - Define a Filter and Install the Software

The following instructions assume you have the minimum system requirements installed. For more information, see [“System Requirements” on page 6](#).

To install Top Producer for Windows Mobile:

- 1 Use the USB slot to connect your device to your computer.
- 2 From the Main Menu of Top Producer 8i select the **Mobility** icon.
- 3 From the **My Device** tab, click the **Register a Device** link.
- 4 From the *Register a Device - Step 1* screen, select the **Windows Mobile** radio button and click **Next**.
- 5 From the *Register a Device - Step 2* screen, define the filter settings that you want to use for your device.

For a complete listing of the fields available and how to use them, see the “Filter subtab” topic in the 8i online help.

- 6 When defining your filter settings for **Contacts & Leads**, pay particular attention to the **To Match** radio buttons.
 - Selecting the **All conditions must be met** radio button will result in the criteria you defined being connected with AND statements (i.e. if you specified a Zip code and an area code, only contacts matching both criteria will be synchronized).
 - Selecting the **Match any conditions** radio button will result in the criteria you defined being connected with OR statements (i.e. if you specified a Zip code and an area code, contacts matching either criteria will be synchronized).

Note: The only exception to the To Match setting concerns the multi-select picklists used for the Contact Type, State, and Country fields. The selections you make in the multi-pick picklists are joined internally by OR statements, regardless of the To Match setting. For example, filtering settings including Contact Types and States criteria would be applied as follows: Contact_Types[Buyer OR Seller] AND State[Washington OR Oregon OR Ohio]. This would match Buyers and Sellers from any of the three states specified.

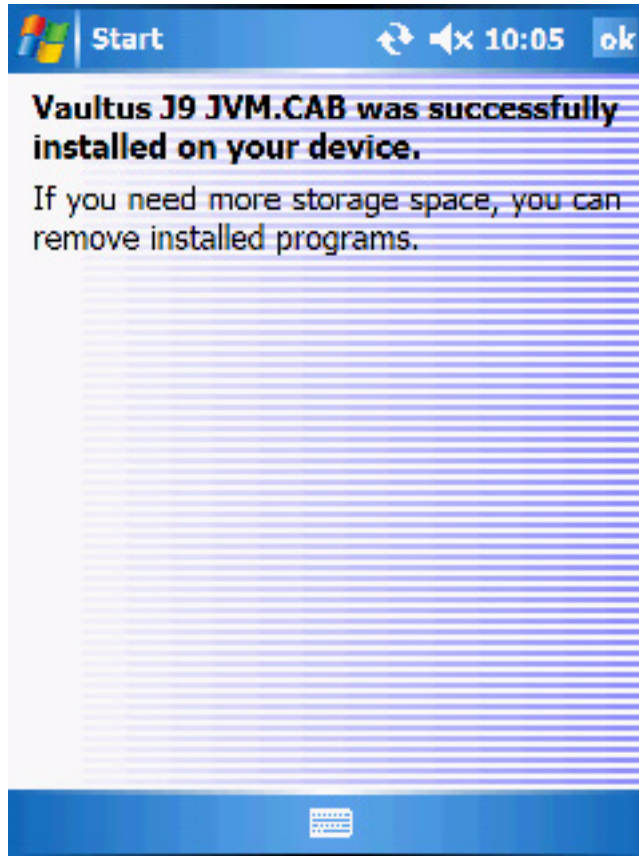
- 7 Click the **Next** button.
- 8 From the *Register a Device - Step 3* screen, click the **Windows Mobile Client Software** link.

The *File Download* dialog box appears.

- 9 Click **Run**.
- 10 When the *Security Warning* dialog box appears, click **Run**.
- 11 Follow the on-screen prompts to install the software.
- 12 When the desktop installation is finished, a message will appear stating that the application will be installed on the next device connection. Click **OK**.

Note: If you are using an expansion memory card, you will be asked whether you wish to install to the handheld's base memory or to the expansion card. Only choose the latter if you are using a high-speed expansion card. **Always install all of the files in just one of the two memory locations. If you don't do this - e.g. you install one file in the handheld's base memory and the other two in the expansion card - Top Producer for Windows Mobile will not run.**

- 13 When the handheld installation finishes, the following message appears:



- 14 Click **OK** to continue. Top Producer for Windows Mobile is now installed on your handheld.

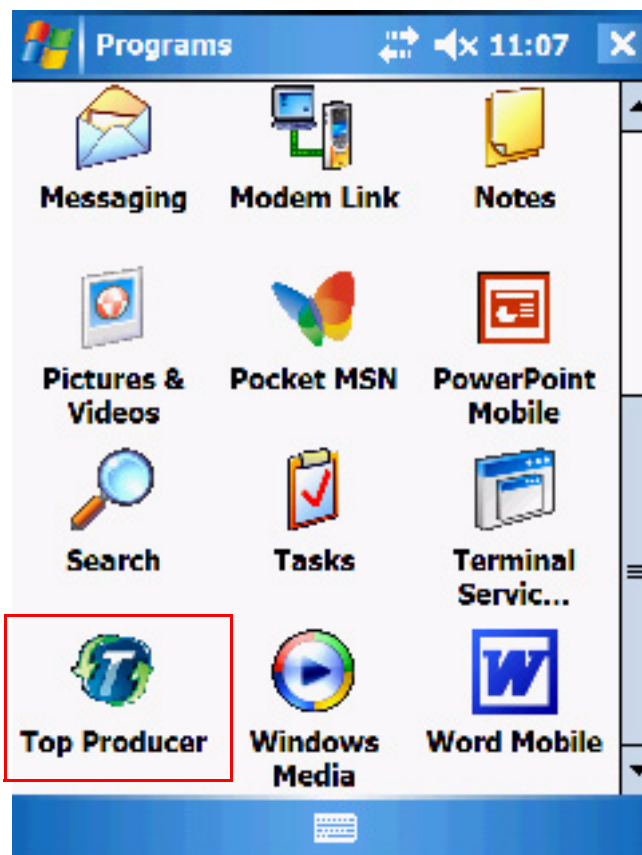
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Downloading your Data

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To download Top Producer 8i data onto your handheld:

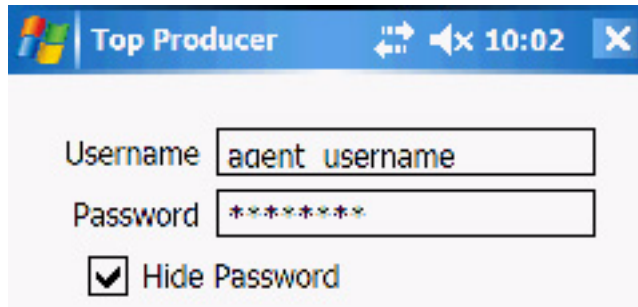
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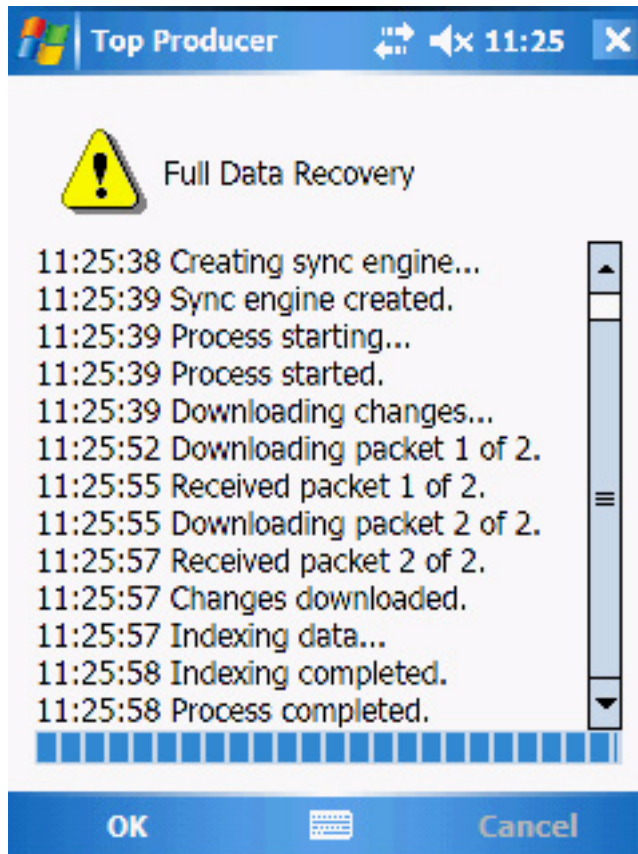
message asking you to log into Top Producer 8i to download your data.

- 4 Click **Yes** and the *Login* screen will appear.



- 5 Enter your Top Producer 7i username and password, then click **Connect** at the bottom left.

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Step 4 - Start up Top Producer for Windows Mobile

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