

Top Producer for BlackBerry Quick Setup

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Getting Started

In this chapter:

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

What is Top Producer for BlackBerry?

Top Producer for BlackBerry 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.

Wireless 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 11](#)).

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:** 1-800-830-6047
- **Fax:** 604-270-6365

Before You Start Installing

- *“System Requirements” on page 6*
- *“Checklist for Getting Started” on page 9*
- *“Performing Carrier Configuration” on page 7*

System Requirements

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

Handheld Memory

- Minimum 64 MB recommended

Computer operating system

- Windows 2000, XP, or Vista

Internet browser

- Internet Explorer 5.0 or higher
- Top Producer 8i-related functions require Internet Explorer 7.0 or Firefox 2.0

BlackBerry Desktop Manager

- BlackBerry Desktop Manager 4.1 or higher

Handheld operating system

- BlackBerry OS 4.0.2 or higher

Note: The following devices are supported:

BlackBerry 7130, 8100, 8300, 8700 series, and 8800 series.

Performing Carrier Configuration

Before installing Top Producer for BlackBerry, you must make sure that your handheld is configured appropriately for the carrier you are using.

For T-Mobile or Cingular

To configure if your carrier is T-Mobile or Cingular:

- 1 From the BlackBerry's main screen, select **Options** (i.e. click on the key icon).
- 2 Next select **Advanced Options**, then **TCP**.
 - a) For **T-Mobile** users, enter the following:

APN: wap.voicestream.com
Username: < leave blank >
Password: <leave blank >

- b) For **Cingular** users, enter the following:

APN: wap.cingular
Username: WAP@CINGULARGPRS.COM
Password: CINGULAR1

Note: All of the above values are case sensitive.

- 3 Return to the main screen and select **Options**.
- 4 Next, select **Security Options**, then **Firewall**.
- 5 Click the thumbwheel and select **Reset Settings**.
- 6 Return to the main screen

Configuring for Other Carriers

To configure if your carrier is NOT T-Mobile or Cingular:

- 1 From the BlackBerry's main screen, select **Options** (i.e. click on the key icon).
- 2 Select **Security Options**, then **Firewall**.
- 3 Click the thumbwheel and select **Reset Settings**.
- 4 Return to the main screen

For Customers using a BES

For customers using devices deployed from a **BES** (BlackBerry Enterprise Server), please ensure that the BES policy associated with the device is configured to:

- 1 Allow third party applications to be installed on the device
- 2 Allow external connections to be made from the device

Checklist for Getting Started

To set up Top Producer for BlackBerry, ensure the following:

- That you have a Top Producer for BlackBerry license.
- The BlackBerry Desktop Manager is installed on your computer.
- You can synchronize your handheld with the BlackBerry Desktop Manager.
- 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 14*
- *“Step 3 - Install the Software” on page 15*
- *“Step 4 - Download Data onto your Handheld” on page 16*
- *“Step 5 - Start up Top Producer for BlackBerry” on page 20*

Step 1 - Assign a License

Follow these steps to make sure that you have been assigned a Top Producer for BlackBerry 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 BlackBerry**.

The displayed agent now has a Top Producer for BlackBerry 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 1-800-444-8570.

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

The *Assistant information* page opens.

Assistant information

Assistant merge code:

Login information

Username
Assistant_username

Password

Give this assistant access to create an email mailbox

Give this assistant access to TOP PRODUCER 7i SellPhone

Give the assistant access to TOP PRODUCER 7i for BlackBerry

Give this assistant access to Agent schedule

Give this assistant access to TOP PRODUCER Outlook Connector

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

The displayed assistant now has a Top Producer for BlackBerry 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 BlackBerry:

- 1 Use the USB slot to connect your device to the computer.
- 2 From the **Setup** menu in Top Producer 7i, under **Applications setup**, click **TOP PRODUCER 7i for handhelds**.
- 3 From the *Handheld manager*, click the **Download Client Software** action item.

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

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

The **Subscriber Agreement** screen appears.

- 6 Read and accept the agreement, then click **Next**.

The **Connected** screen will appear.

- 7 Click on the **Load** link.

The BlackBerry software will now be downloaded, a progress bar will appear showing the installation's progress. When the installation is complete, the **Handheld manager** will reappear.

Note: Windows users might get a security message asking whether they'd like to run the file or save it to the desktop. If this is the case, click **Run** to proceed with the installation.

Step 4 - Download Data onto your Handheld

There are two methods for downloading your Top Producer 7i data onto your handheld:

- **Download from your computer:** When you select this option, you'll receive an email confirming that your data is ready for download. Once downloaded, you can restore this file using the **BlackBerry Desktop Manager**.
- **Download over-the-air:** This method does not require that you be near your computer. However, it can take a long time, depending on the size of your database and the wireless signal's strength. We recommend large or unlimited data plans when choosing this option. If you have any questions about your data plan, please contact your wireless provider.

Note: Top Producer strongly recommends the **Download from your computer** option. For users with larger databases (i.e. 500+ contacts), this is the fastest and most reliable option for restoring data onto your device.

Downloading from your Computer

To download your data using the "Full Data Recovery via Email" method:

- 1 Make sure that you have connected your handheld to your computer through the USB port.
- 2 Open Top Producer for BlackBerry.

Important: A Full Data Recovery (FDR) replaces all the data on your handheld. Before doing an FDR, make sure that any changes that you've made to the data on the handheld have been synchronized with Top Producer 7i.

A dialog box appears prompting you to download your data.



- 3 Select **No**, then from the main menu, select **Full Data Recovery Via Email**.

The **Login** screen appears.



- 4 Enter your Top Producer 7i username and password.



Warning: After performing an FDR via Email, it is very important not to use or synchronize your Top Producer for BlackBerry application until you have successfully restored the database file (i.e. the IPD file). Otherwise, any data entered on the device will be lost.

- 5 Once completed, you will receive an email message indicating that your Top producer data is ready for download.

- 6 Start up your Internet Browser on your PC and sign onto your Top Producer account.
- 7 From the setup menu, select **Application Setup**, then **Top Producer 7i for Handhelds**.

The *Handheld Manager* Screen appears.

- 8 From the **Action** menu, select **Download Email FDR results**.

The *FDR Database download* page appears.

- 9 Go to your computer's desktop and create a folder called **FDR_download**. Then, return to the Top Producer *FDR download* page and click on the download link.

The *Download* screen will appear.

- 10 Name the file **TPBB.ipd**, then save it to the **FDR_download** folder.

The download will proceed. When finished, click **OK**. Your TP database has now been downloaded to your folder.

- 11 If Top Producer is running on your BlackBerry, shut it down by choosing **Shutdown** from the main menu. Then make sure that your BlackBerry is connected to your computer's USB port.

- 12 From your desktop, select **Start > Programs > BlackBerry > Desktop Manager**.

This launches the **BlackBerry Desktop Manager** on your computer.

- 13 Double click on the BlackBerry manager's **Backup and Restore** icon. When that screen opens, click **Restore**.

- 14 A screen will appear asking you to locate the file containing the restore information. Navigate to the folder **FDR_download**, select **TPBB.ipd**, then click **Open**. An information message will appear. Click **OK**.

The data-loading screen appears and displays the progress of the database loading.

Note: Please make sure that your BlackBerry is connected to your computer throughout this

process. Depending on the size of your data, it may take from several minutes to over an hour.

- 15 When the restore is complete, the **Backup and Restore** screen will re-appear on your computer. Click **Close** to exit.

- 16 Launch the Top Producer application on your BlackBerry.

The handheld will now organize the downloaded data. This can also take from several minutes to over an hour.

- 17 When completed, the Top Producer application opens and your newly-installed data appears.

Note: If Top Producer opens with no data, select **Shutdown** from the main menu and restart the Top Producer application. If you still have problems, please contact Top Producer Technical Support.

Receiving Data Over-the-air

To receive your data over-the-air:

Note: Make sure you have a good wireless signal and an appropriate data plan package before proceeding. Depending on the size of your database, this process could take 30 minutes to a few hours.

- 1 Open Top Producer for BlackBerry.

A dialog box appears prompting you to download your data.

- 2 Select **Yes**.

The **Login** screen appears.

- 3 Enter your Top Producer 7i username and password.

- 4 From the menu, select **Login**.

Your data will begin downloading onto your handheld.

- 5 Once you see the message **Process completed** on the handheld, select **Close** from the menu. You should now be able to access your data from Top Producer for BlackBerry.

Step 5 - Start up Top Producer for BlackBerry

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

Logging on

To log onto Top Producer for BlackBerry:

- 1 From the handheld's main screen, select the **Top Producer** application.
- 2 If it is the first time you have opened the application, you will be asked for login information and then a dialogue box will appear prompting you to download your Top Producer 7i data.



- 3 The home screen appears, displaying tabs for each feature.

Top Producer

Find:

Name	Phone/Email	Type
Abbott, Sophie	(313) 454-3565	H
Abernathy, Marti	(313) 584-4369	H
Acosta, Shelby	(313) 586-2037	H
Acuna, Elvie	(313) 585-7577	H
Bain, Mechelle	(313) 578-4683	H
Baines, Ermelinda	(313) 576-8039	H
Bair, Ezekiel	(313) 579-7149	H



Last Sync: 01/15 04:14

Installing from Top Producer 8i

- *“Step 1 - Assign a License” on page 24*
- *“Step 2 - Define a Filter and Install the Software” on page 25*
- *“Step 3 - Download Data onto your Handheld” on page 27*
- *“Step 4 - Start up Top Producer for BlackBerry” on page 30*

Step 1 - Assign a License

Follow these steps to make sure that you have been assigned a Top Producer for BlackBerry 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 BlackBerry** 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 BlackBerry** 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 BlackBerry:

- 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 **BlackBerry** radio button and click the **Next** button.
- 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 of the 8i online help system.

- 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 **BlackBerry Client Software** link.
- The Subscriber Agreement appears.
- 9 If you accept the terms, select the **I have read and accept the terms of this agreement** radio button and click the **Next** button.
 - 10 Scroll to the bottom of the BlackBerry Application Installation window and click the **Load** button.

The application is loaded onto your BlackBerry.

Step 3 - Download Data onto your Handheld

There are two methods for downloading your Top Producer 8i data onto your handheld:

- **Download from your computer:** When you select this option, you'll receive an email confirming that your data is ready for download. Once downloaded, you can restore this file using the **BlackBerry Desktop Manager**.
- **Download over-the-air:** This method does not require that you be near your computer. However, it can take a long time, depending on the size of your database and the wireless signal's strength. We recommend large or unlimited data plans when choosing this option. If you have any questions about your data plan, please contact your wireless provider.

Note: Top Producer strongly recommends the **Download from your computer** option. For users with larger databases (i.e. 500+ contacts), this is the fastest and most reliable option for restoring data onto your device.

Downloading from your Computer

To download your data using the "Full Data Recovery via Email" method:

- 1 Make sure that you have connected your handheld to your computer through the USB port.
- 2 Open Top Producer for BlackBerry.
- 3 A dialog box appears prompting you to download your data.



- 4 Select **No**, then from the main menu, select **Full Data Recovery Via Email**.

The **Login** screen appears.



- 5 Enter your Top Producer 7i username and password.



Warning: After performing an FDR via Email, it is very important not to use or synchronize your Top Producer for BlackBerry application until you have successfully restored the database file (i.e. the IPD file). Otherwise, any data entered on the device will be lost.

- 6 Once completed, you will receive an email message indicating that your Top producer data is ready for download.

- 7 From Main Menu of Top Producer 8i, select the Mobility icon.

The *Mobility* Screen appears.

- 8 Click the **Email FDR Dataset** link.

The *FDR Database download* page appears.

- 9 Carefully follow the instructions on the download page for downloading the dataset to your computer and restoring it to your device. When the process is completed, your device is ready to use.

Receiving Data Over-the-air

To receive your data over-the-air:

Note: Make sure you have a good wireless signal and an appropriate data plan package before proceeding. Depending on the size of your database, this process could take 30 minutes to a few hours.

- 1 Open Top Producer for BlackBerry.

A dialog box appears prompting you to download your data.

- 2 Select **Yes**.

The **Login** screen appears.

- 3 Enter your Top Producer 8i username and password.

- 4 From the menu, select **Login**.

Your data will begin downloading onto your handheld.

- 5 Once you see the message **Process completed** on the handheld, select **Close** from the menu.

You should now be able to access your data from Top Producer for BlackBerry.

Step 4 - Start up Top Producer for BlackBerry

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

Logging on

To log onto Top Producer for BlackBerry:

- 1 From the handheld's main screen, select the **Top Producer** application.
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Bair, Ezekiel	(313) 579-7149	H



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