

# Top Producer<sup>®</sup> for Palm<sup>™</sup> Handhelds

*Quick Setup*



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## Top Producer for Palm handhelds Quick Setup

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# Introduction

**In this chapter:**

- *“What Is Top Producer for Palm?” on page 5*
- *“Top Producer for Palm System Requirements” on page 6*
- *“About This Quick Setup Guide” on page 7*
- *“Contacting Technical Support” on page 10*

# What Is Top Producer for Palm?

Welcome to Top Producer for Palm. With Top Producer for Palm, you can take full advantage of your Palm OS™-based handheld device by using it to access your online Top Producer data any time and anywhere.

You can enter new contacts, property details, listings, closings and more, synchronizing them with Top Producer.

# Top Producer for Palm System Requirements

Top Producer for Palm requires the following hardware and software.

- **Desktop computer operating system:** Windows 98, Windows ME, Windows NT 4 (requires Service Pack 6A), Windows 2000 Professional (requires Service Pack 2, and user installing TPP 7i must have Administrator privileges), Windows XP Professional, or Windows Vista.
- **Supported Internet browser:** Internet Explorer 5.5, 6.0, or 7.0.
- **Palm Desktop:** Palm Desktop 3.0.1 or newer. However, if your desktop computer operating system is Windows XP Professional or Windows Vista, you must be using Palm Desktop 4.0 or newer.
- **Internet access:** 56K modem or any high-speed connection (DSL or cable).
- **Handheld operating system:** Palm OS 3.3 or higher.

# About This Quick Setup Guide

This guide was written to help you install and set up Top Producer for Palm quickly and easily.

Quick Setup:

- Provides you with information on how to contact Technical Support for assistance.
- Tells you how to set up Top Producer for Palm, including how to assign a Top Producer for Palm license from Top Producer 7i or 8i, how to perform a HotSync test, and how to download and install Top Producer for Palm.
- Describes the basics on how to use Top Producer for Palm, including how to log on and how to work with some of the basic screens.
- Tells you how to upgrade from a previous version of Top Producer for Palm.

## About Portable Document Format (PDF)

Top Producer for Palm Quick Setup is presented in Portable Document Format, and is viewed by using the 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.

**To print this Quick Setup 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 for Palm 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.

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**Note:** If you save the Top Producer for Palm 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.

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### To save this guide to your computer:

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

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

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

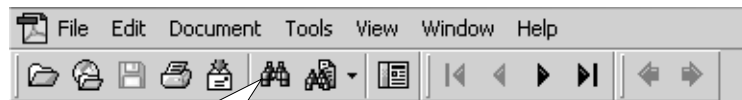
Now you can quickly access this Quick Setup from its saved location whenever necessary.

## Searching for specific information

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

### 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 synchronization, type "synchronization".
3. Depending on your search preferences, select one or all of the check boxes.
4. Click **Find**.

## Navigating within the Quick Setup

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 "[Installing Palm Desktop software](#)" on page [x], 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 for Palm in as little time as possible, the Top Producer for Palm User Guide provides in-depth documentation on all of Top Producer for Palm's features.

### To access the Top Producer for Palm 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 for Palm** heading in the table, click **User Guide**.

The *Top Producer for Palm* User Guide opens.

# Contacting Technical Support

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

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

- **Email:** support@topproducer.com
- **Toll-free:** 1.800.830.6047
- **Fax:** 604-270-6365

For product information and FAQs, go to  
[www.topproducer.com](http://www.topproducer.com).

# Installing Top Producer for Palm for the First Time

## **In this chapter:**

- *“Checklist For Getting Started” on page 12*
- *“Assigning a License in Top Producer 7i” on page 13*
- *“Installing Palm Desktop Software” on page 16*
- *“Performing A HotSync Test” on page 17*
- *“Downloading And Installing from Top Producer 7i” on page 18*

# Checklist For Getting Started

To purchase a license for Top Producer for Palm, either contact our Sales Department at 1-800-444-8570, or use the Subscription Manager in Top Producer 7i. To learn more about using the Subscription Manager, see the Top Producer 7i User Guide.

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

There are three steps to setting up and installing Top Producer for Palm.

Carry out these steps in sequence:

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**Note:** If you are upgrading from a previous version of TPP, see *"Upgrading From An Older Version Of TPP" on page 34*.

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1. Assign a Top Producer for Palm license from Top Producer 7i (see [page 13](#)).
2. Perform a HotSync test (see [page 17](#)).
3. Download and install Top Producer for Palm (see [page 18](#)).

If you receive any messages not listed in the installation instructions, please refer to the Top Producer for Palm User Guide.

# Assigning a License in Top Producer 7i

## To assign a Top Producer for Palm license to the agent:

Follow these steps to ensure that you have been assigned a Top Producer for Palm 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. In the **Additional Top Producer applications** section, select the **TOP PRODUCER 7i for Handhelds** check box.

The displayed agent now has a Top Producer for Palm license.

3. Click **OK**.

## To assign a Top Producer for Palm license to the assistant:

Follow these steps if you purchased more than one Top Producer for Palm license and you want to assign a license to an assistant who also has a handheld device:

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

The *Agent information* page opens.

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

The *Assistants* page opens.

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**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.

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3. Select the assistant you want to assign a license to, and then click **View or edit** from the action menu.

The *Assistant information* page opens.

4. In the **Login information** section, select **Top Producer for Palm**.

The displayed assistant now has a TPP 7i license. However, in order to use Top Producer for Palm, the assistant must also install Top Producer for Palm to their handheld device. For more information, see ["Downloading And Installing from Top Producer 7i" on page 18](#).

# Assigning a License in Top Producer 8i

Follow these steps to make sure that you have been assigned a Top Producer for Palm 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 Palm** 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** link.
5. From the Assign Licenses and Feature Access fieldset, select the Give this assistant access to checkbox and select **Palm OS** from the drop-down list.
6. Click the **Save Assistant Info** button.

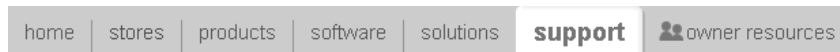
# Installing Palm Desktop Software

You must have Palm™ Desktop (version 3.0.1 or newer) installed on your PC before you can install Top Producer for Palm. If you have not yet installed Palm Desktop, please do so now, referring to the installation instructions accompanying the Palm Desktop software.

You can also download Palm Desktop from the Palm™ web site.

## To access the Palm web site:

1. Using your browser, go to <http://www.palm.com>.
2. Click on the **Support** tab.



3. From the left column, click on **support downloads**.
4. Under **desktop & hotsync**, click the drop-down list and select **Palm Desktop for Windows**.

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**Note:** The Palm web site is maintained by Palm, Inc. and could change without notice from Top Producer.

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# Performing A HotSync Test

You must have Palm™ Desktop (version 3.0.1 or newer) installed on your personal computer before you can install Top Producer for Palm. If you have not yet installed Palm Desktop, please do so now, referring to the installation instructions accompanying the Palm Desktop software. If you need to, you can download Palm Desktop from the Palm™ web site at <http://www.palm.com>.

The synchronization process, called the “HotSync operation,” is the transferring of information between your computer and handheld device.

Before synchronizing with Top Producer 7i/8i, your handheld device must be able to successfully communicate with the Palm Desktop software on your PC.

You should successfully complete a HotSync operation with the handheld at least once before installing Top Producer for Palm and synchronizing with Top Producer 7i/8i.

To test whether your handheld can communicate with your desktop PC:

1. Enter a test contact into the Address book on your handheld.
2. Enter a different test contact into the Address book of the Palm Desktop software on your personal computer.
3. Perform a HotSync operation.

To learn more, see the *“Performing A HotSync Operation And Viewing The HotSync Log”* topic in the Top Producer for Palm User Guide.

4. **Both** contacts should appear in the Address book on **both** your handheld and the Palm Desktop software on your personal computer.

If your HotSync test was:

- successful, continue to the next section.
- unsuccessful, refer to the documentation accompanying your handheld device or contact your handheld manufacturer's Technical Support.

For instructions on setting up your handheld, please refer to the instruction manuals accompanying the Palm Desktop Software and your handheld device.

# Downloading And Installing from Top Producer 7i

You will download Top Producer for Palm from the Internet, install it onto your computer, and then install it onto your handheld.

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**Note:** If you are installing Top Producer for Palm under Windows 2000, you must have **Administrator** privileges. To learn more, see the *"Error installing under Windows 2000"* section in the Top Producer for Palm User Guide.

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## To download and install Top Producer for Palm:

1. Close all programs other than your Web browser and log into Top Producer 7i.
2. Point to **Setup**, then **Applications setup**, and then click **TOP PRODUCER 7i for handhelds**.

The *Handheld manager* page opens.

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**Note:** If your Top Producer 7i database is larger than a certain size, you will be prompted to filter your data. To learn more, see the *"How To Install Top Producer for Palm"* section in the Top Producer for Palm User Guide. When you have finished setting up the filter, return to these instructions. If you are not required to filter your data, you will see the *Handheld manager* page.

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

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**Note:** If the Palm Desktop version on your computer is older than 3.0.1, you will be prompted to upgrade before installing Top Producer for Palm. Using your browser, go to

the Palm web site to update your Palm Desktop, (see [“Installing Palm Desktop Software” on page 16](#)). Once you’ve completed the upgrade, return to step 3.

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The *File Download* dialog box opens.

4. Click **Open**.

The files are downloaded to your computer and the *TOP PRODUCER 7i for Palm handhelds installation* dialog box opens.

5. Click **Next**.

The license agreement appears.

6. Read the license agreement carefully. If you agree to its terms, select **I accept the agreement**, then click **Next**.

You won’t be able to continue if you don’t accept the license agreement.

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**Note:** If you are installing Top Producer for Palm for the first time, you will be prompted to select a destination directory for the installation. Select a directory and then click **Next**.

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The file folder/program group information opens.

7. Click **Next**.

The *Installing progress* bar displays the installation progress, then the *HotSync information* dialog box opens.

8. Click **Next**.

The *Select Palm Desktop user* window opens.

9. Click the drop-down list and select the name of the Palm Desktop user that corresponds to the handheld device you are installing Top Producer for Palm onto, then click **Next**.

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

10. Enter your user name and password, then click **Next**.

The *Before you install* window displays details of your installation.

11. Click **Finish**.

The *Installation successful - two more steps required* window opens.

12. Click **Close**.

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**Note:** If a message appears, prompting you to restart your computer, click **OK**. Once the computer has restarted, continue to step 14. If you do not see this message, click **Done** from the *Handheld manager* page.

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13. Make sure your handheld is in its cradle and press the **HotSync** button. This HotSync operation installs Top Producer for Palm onto your handheld.
14. Wait for the HotSync operation to complete, then press the **HotSync** button again.

This HotSync operation sends your Top Producer 7i data to the handheld.

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**Note:** This may take some time, especially if you have a large number of contacts. Please wait for HotSync to complete and do **NOT** press **Cancel**. To check that the operation was completed successfully, from the Windows desktop click **Start, Programs, Top Producer for Palm**, and then click **Log manager**.

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See the Top Producer for Palm User Guide for more detailed information.

You can now use Top Producer for Palm on your handheld. For an introduction to some of the various features available, see ["Using Top Producer for Palm" on page 24](#).

# Downloading and Installing from Top Producer 8i

You will register your device in Top Producer 8i, define filter settings for your HotSync operation, download Top Producer for Palm, install it onto your computer, and then install it onto your handheld.

## To install Top Producer for Palm:

1. From the Main Menu of Top Producer 8i select the **Mobility** icon.
2. From the My Device tab, click the **Register a Device** link.
3. From the Select Device screen, select the **Palm** radio button and click the **Next** button.
4. From the Apply Filter 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.

5. 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).

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**Note:** The only exception to the To Match setting concerns the multi-select picklists used for

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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.

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6. Click the **Next** button.
7. Click the **Palm Client Software** link.
8. Select the **I accept the terms of this agreement** link and click the **Next** button.

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**Note:** If the Palm Desktop version on your computer is older than 3.0.1, you will be prompted to upgrade before installing Top Producer for Palm. Using your browser, go to the Palm web site to update your Palm Desktop, (see *"Installing Palm Desktop Software" on page 16*). Once you've completed the upgrade, return to step 3.

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9. From the File Download dialog box, click **Open**.  
  
The files are downloaded to your computer.
10. From the Top Producer to Palm dialog box, click **Next**.
11. Read the license agreement carefully. If you agree to its terms, select **I accept the agreement**, then click **Next**. You won't be able to continue if you don't accept the license agreement.

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**Note:** If you are installing Top Producer for Palm for the first time, you will be prompted to select a destination directory for the installation. Select a directory and then click **Next**.

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12. Select the file/folder and program group you want to use for the application and click **Next**.

13. When the HotSync Information dialog box opens, click **Next**.
14. From the Select Palm Desktop user dialog box, click the drop-down list and select the name of the Palm Desktop user that corresponds to the handheld device you are installing Top Producer for Palm onto, then click **Next**.
15. Enter your user name and password, then click **Next**.
16. Click **Finish**.
17. Click **Close**.

---

**Note:** If a message appears, prompting you to restart your computer, click **OK**. Once the computer has restarted, continue to step 14. If you do not see this message, click **Done** from the *Handheld manager* page.

---

18. Make sure your handheld is in its cradle and press the **HotSync** button. This HotSync operation installs Top Producer for Palm onto your handheld.
19. Wait for the HotSync operation to complete, then press the **HotSync** button again.

This HotSync operation sends your Top Producer data to the handheld.

---

**Note:** This may take some time, especially if you have a large number of contacts. Please wait for HotSync to complete and do NOT press **Cancel**. To check that the operation was completed successfully, from the Windows desktop click **Start, Programs, Top Producer for Palm**, and then click **Log manager**.

---

See the Top Producer for Palm User Guide for more detailed information.

You can now use Top Producer for Palm on your handheld. For an introduction to some of the various features available, see ["Using Top Producer for Palm" on page 24](#).

# Using Top Producer for Palm

**In this chapter:**

- *“Logging On” on page 25*
- *“Basic Screens” on page 26*

# Logging On

Once you have installed Top Producer for Palm onto your device, the next step is to log on.

Top Producer for Palm allows access to only one user database. When you log on for the first time, you will see the username of the Top Producer database that has been sent to the handheld, and the **Password** field will be empty.

Later, you can change your password or set your log on preferences so that you do not have to specify a password.

## To log on to Top Producer for Palm:

1. From the *Application picker* of your handheld device, tap the **Top Producer for Palm** (TPP) icon to start.
2. The logon screen displays the Top Producer username:



3. The first time you log on the password will be blank. Click **OK** to log onto Top Producer for Palm.

The *Startup* screen (also referred to as a contact list) opens.

# Basic Screens

This section provides you with a quick overview of the basic and most frequently used screens in Top Producer for Palm. For detailed information on all the Top Producer for Palm features, refer to the Top Producer for Palm User Guide.

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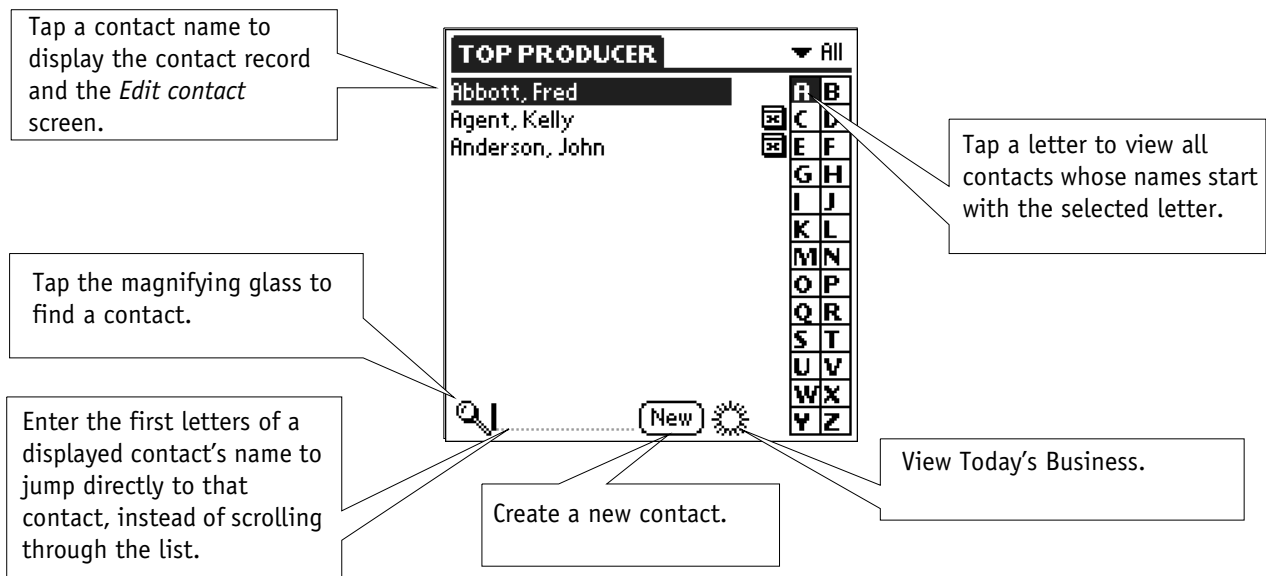
**Note:** These instructions assume that you have successfully installed the Top Producer for Palm application onto your Palm handheld device. These steps do **NOT** apply to any of the applications that come with your handheld device. For more information on those, please refer to the Setup Guide that came with your Palm handheld.

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## The Startup screen / Contact list

Typically, this screen is the first screen you see when you log on to Top Producer for Palm (unless you set your preferences to show Today's business on start up. To learn more about setting up your preferences, see the Top Producer for Palm User Guide).

The *Startup* screen displays an alphabetical list (Tabbed View) of contacts and an icon indicating associated notes or events.



## The Record menu

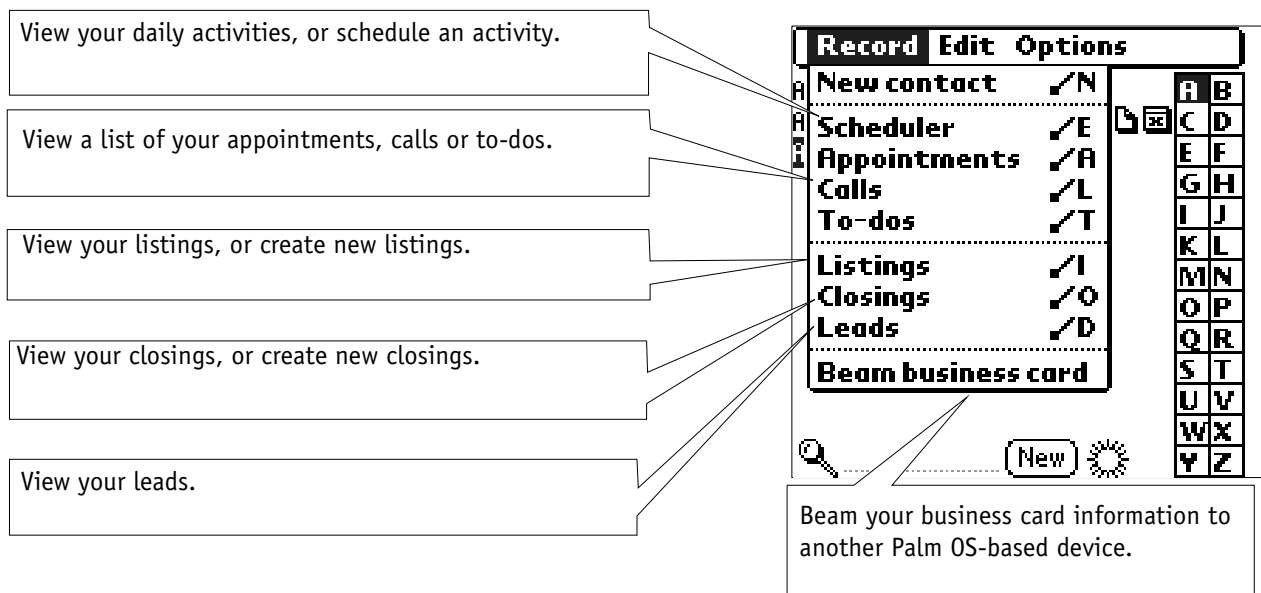
Use the **Record** menu commands to add a new contact record, view lists of activities, access the listings, closings and leads, and to beam business card information.

### To access the Record menu:

1. On the handheld device, tap on the far left corner of the screen.

A drop-down menu should appear.

2. Tap an option to access the relevant screen.



## The Edit contact screen

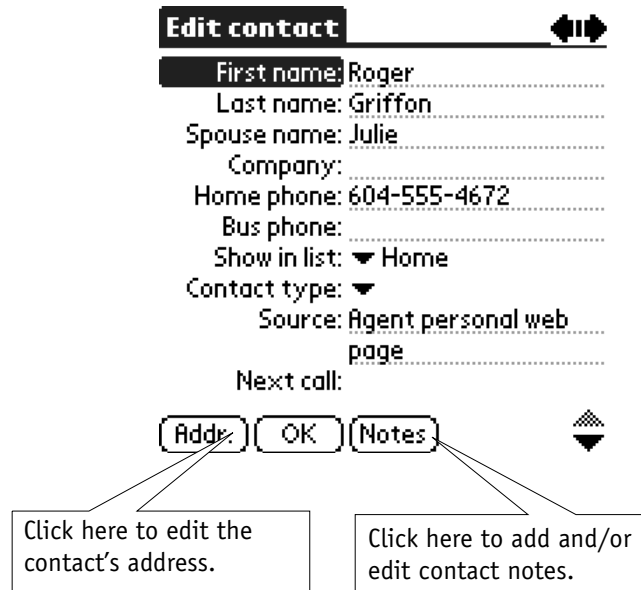
Use the *Edit contact* screen to modify name, address, and property information for the selected contact.

### To access the Edit contact screen:

1. Tap a contact from the *Startup* screen.

The contact record opens.

2. Tap **Edit** to display the *Edit contact* screen.



## Today's business

The *Today's business* screen is the starting point for all your daily activities. You can instantly see the number of activities you have scheduled for a selected date, broken down by activity type.

### To access Today's business:

1. From the *Startup* screen, tap the (☀) icon.

Today's Business displays your daily activities.

Tap the **Appointments** icon to view a list of your appointments (see below).

Tap the **Calls** icon to view a list of your calls.

Tap the **To-dos** icon to view a list of your to-dos.

Tap an activity icon to edit or view details of the activity.

Tap the **New** icon (☰) to schedule a new appointment, new call, or new to-do.

**Today's business**

☰	Appointments	3
☎	Calls	2
☰	To-dos	80

Start date: Jul 9, 2002  
 End date: Jul 9, 2002  
 Assigned to: All

Done

**Appointments** All

☰	7/7/02	3:00 pm	Inspection
☰	7/9/02	3:00 pm	Meet to dis...
☰	7/9/02	4:00 pm	Meet lawyer

**Gardener James d**

**Meet to discuss inspection**

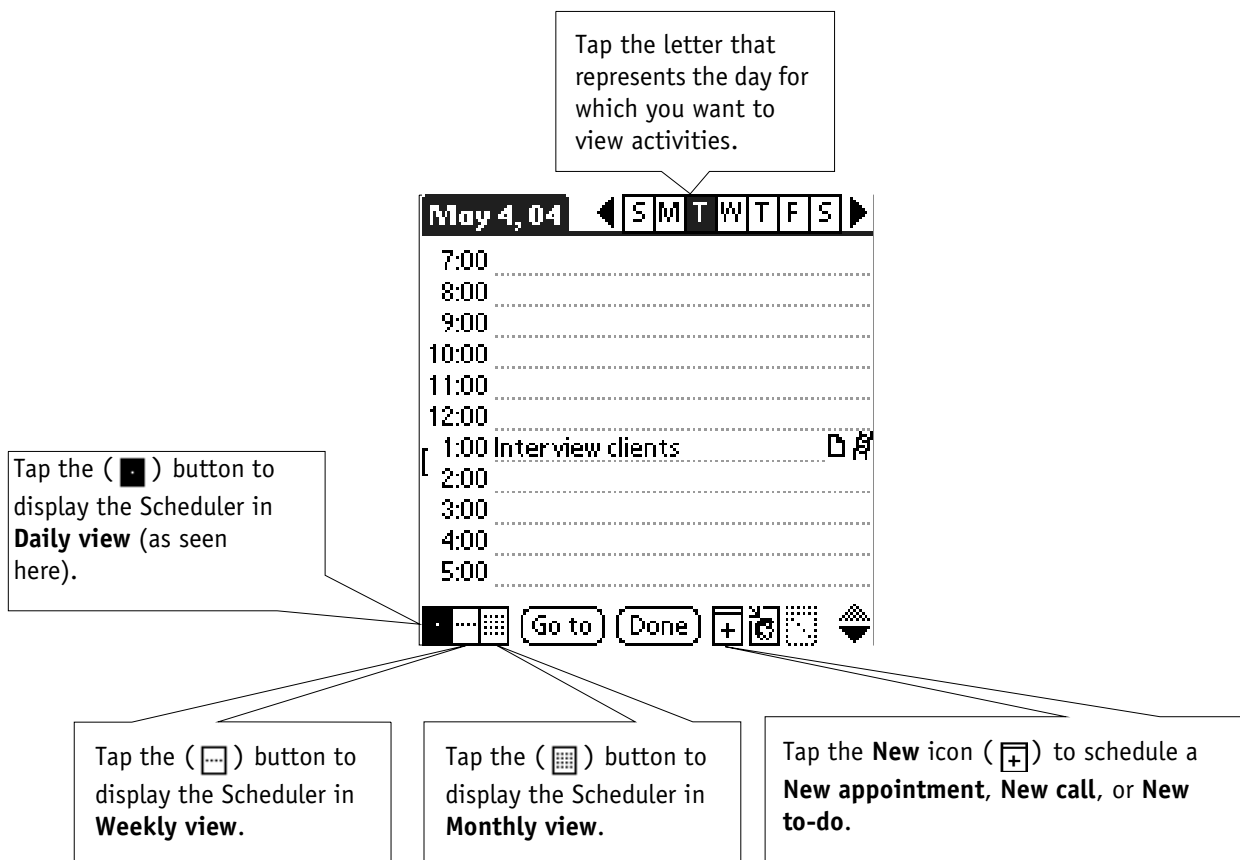
☑ Date Range Done + ☎

## The Scheduler

The Scheduler graphically displays your activities on a daily, weekly or monthly basis.

### To access the Scheduler and set the view:

1. From the *Startup* screen, tap on the far left corner of the screen.
2. Tap **Record**, then **Scheduler**.

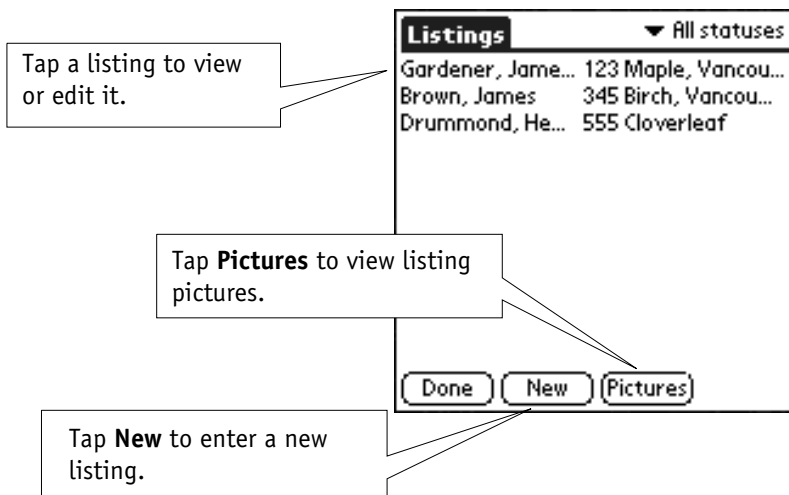


## The Listings screen

The *Listings* screen displays contacts who are selling properties. You can view all listings, those of a particular status, or you can create new listings.

### To access the Listings screen:

1. From the *Startup* screen, tap on the far left corner of the screen.
2. Tap **Record**, then **Listings**. See also [“The Record menu” on page 27](#)).

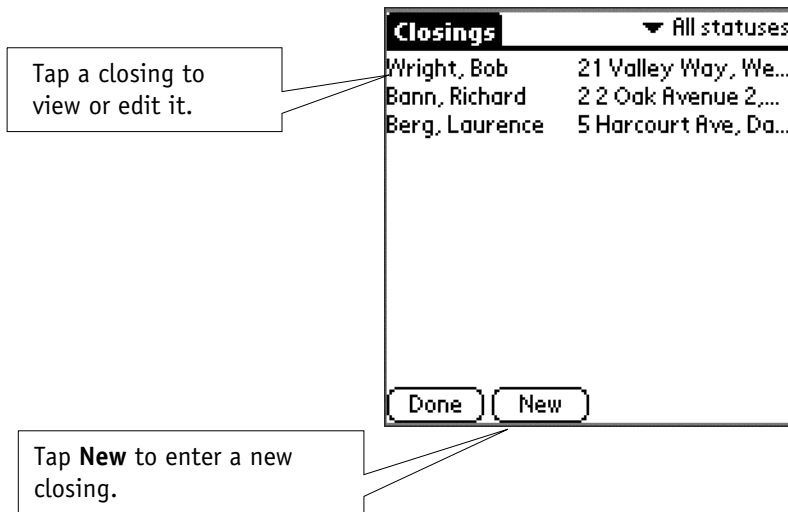


## The Closings screen

The *Closings* screen displays a list of your closings. You can view all closings, or closings with a particular status. You can also create new closings.

### To access the Closings screen:

1. From the *Startup* screen, tap on the far left corner of the screen.
2. Tap **Record**, then **Closings**. See also: [“The Record menu” on page 27.](#)

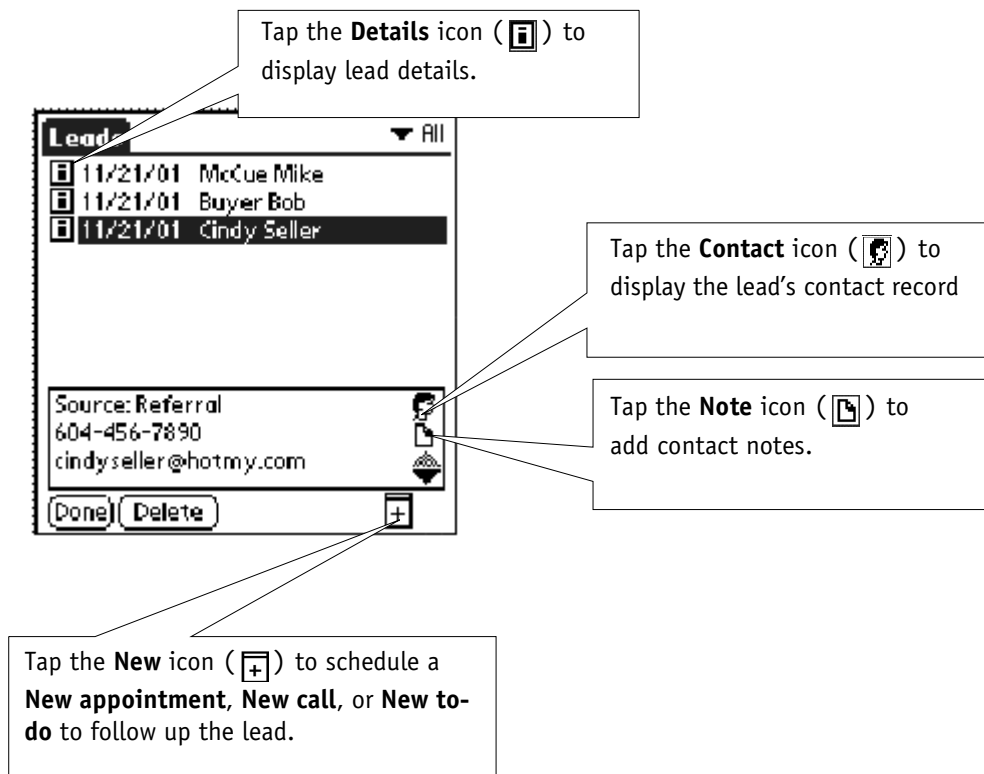


## The Leads screen

The *Leads* screen displays a list of your leads. By default, you will see only new leads. However, you can also see leads of a specific status, such as **Followed-up** leads.

### To access the Leads screen:

1. From the *Startup* screen, tap on the far left corner of the screen.
2. Tap **Record**, then **Leads**. See also: [“The Record menu” on page 27.](#)



# Upgrading From An Older Version Of TPP

## **In this chapter:**

- *“Which Upgrade Option Do I Perform?” on page 35*
- *“Upgrading without importing data” on page 35*
- *“Upgrading from a stand-alone version of TPP 2.0” on page 36*
- *“Upgrading from a synchronizable version of TPP” on page 38*

# Which Upgrade Option Do I Perform?

You can upgrade to Top Producer for Palm from:

- an older version of TPP without importing your data (see below).
- an older stand-alone version of TPP 2.0 by importing your data into Top Producer 7i, and then into Top Producer for Palm (see [page 36](#)).
- an older stand-alone or 'synchronizable' version of TPP by importing and synchronizing your data (see [page 38](#)).

## Upgrading without importing data


You can upgrade to Top Producer for Palm from an older version of TOP PRODUCER for Palm Computing Connected Organizers (TPP) without importing the data from your old system.

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**Note:** All TPP data on the handheld will be deleted.

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### To upgrade to Top Producer for Palm without importing data:

1. Tap the "**House**" () icon on the handheld to view the *Applications* menu.
2. Tap on the far left corner of the screen and select **Delete**.
3. Tap **TPP** and select **Delete**.
4. Tap **Yes** in the *Delete application* message box.  
  
TPP is deleted from the handheld.
5. Tap **Done**.
6. Place your handheld in its cradle and press the **HotSync** button to complete the uninstall process.

## 7. Uninstall TPP from your master desktop computer:

- From the Master computer, click the **Start** button and point to **Programs**.
- Select **Top Producer for Palm Computing Connected Organizers** and then click **Uninstall**.
- At the *Uninstall Top Producer for Palm Computing Connected Organizers* screen, click **Yes**.
- If prompted to *Remove shared components?* click **No to all**.

Install Top Producer for Palm on the handheld, following the instructions in [“Downloading And Installing from Top Producer 7i” on page 18](#). If you have already downloaded the client software, click **Start, Programs, Top Producer for Palm**, then **Install Tool**, and follow the instructions.

## Upgrading from a stand-alone version of TPP 2.0

You can import data from an older stand-alone version of Top Producer for Palm Computing Connected Organizers 2.0 (TPP 2.0) into Top Producer 7i on your PC, and then into Top Producer for Palm (Top Producer for Palm).

Please note the following points:

- Importing is a one-way process and you cannot send Top Producer 7i data to your stand-alone version of TPP 2.0. If you want to be able to synchronize your Palm handheld with Top Producer 7i, you will have to subscribe to Top Producer for Palm.
- 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 stand-alone 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, Data transfer/conversion**, and click **Convert my Top Producer Palm 2.0 data**.
3. Click the first **Click here** link.
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**. It may take a few minutes for the software to download. Locate the file on your computer and click on it.
  - **Open** — the Top Producer for Palm Installation wizard opens.
5. When the download is complete, the *Welcome to Top Producer for Palm 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 **User name** 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 stand-alone 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 two 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. To check that the operation was completed successfully, from the Windows desktop click **Start, Programs, Top Producer for Palm**, and then click **Log manager**.

For product information and FAQs, go to [www.topproducer.com](http://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.

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/8i. Finally, synchronize with Top Producer for Palm.

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

To learn more, please see your Top Producer for Palm User Guide.

### Before you import data

Before importing your Top Producer Desktop desktop data, you should synchronize all Remote computers and handheld devices, and back up your data. It is vital to synchronize as advised, otherwise the data currently stored on Remote computers and handheld devices may not be available in Top Producer for Palm.

#### **A) Synchronize all Remote computers and handheld devices**

To consolidate all of your data at one location, you should send all database changes from each Remote computer, including handheld devices, to your Master computer. For detailed

instructions on how to synchronize (and/or HotSync), see your Top Producer Desktop User Guide and/or TOP PRODUCER for Palm Connected Organizers (TPP) User Guide.

Once you have synchronized all of the data to the Master computer, verify that the data on the Master is correct and up-to-date.

## B) Back up your database

The backup operation should be performed at the Master computer once you have synchronized all your Remote computers and your handheld devices. We recommend that you make a backup of your Top Producer Desktop 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, see your Top Producer Desktop User Guide.

## Importing your data into Top Producer 7i

Once you have completed the preparatory steps, proceed as follows to complete the import process:

1. Exit Top Producer Desktop desktop and log into Top Producer 7i.
2. Point to **Setup**, then **Data transfer/conversion**, and then click **Convert my Top Producer desktop data**.

The *Data Conversion from Top Producer* message box opens.

3. Click **OK**.

The *File download* message box opens.


4. Select **Save this program to disk** and click **OK**.
5. Save the file to a directory, specify a file name, then click **Save**. When the file download is complete, double-click the file to open it or, depending on your browser, click **Open** in the *Download complete* message box.
6. If requested, click **OK** to restart your computer. The data conversion utility will begin automatically when your computer has restarted. If the utility does not start automatically, double-click the **Top Producer Data Conversion Wizard** icon on your desktop.
7. Click **Next** in the *Data conversion wizard* window.

8. In the *Data conversion wizard - Top Producer desktop login* window, select your Top Producer desktop username, type your password and click **Next**.
9. Select the database(s) you want to convert from the **Database names** box on the *Select database(s) to convert* window. Hold the **[Ctrl]** key while clicking to select multiple databases.
10. In the *Data conversion wizard - Top Producer 7i login* window, type in your Top Producer 7i username and password and click **Next**.
11. Enter your email address in the *Data conversion wizard - Enter email address* window, then click **Next**.
12. The *Data conversion wizard - Converting your data* window will display the progress of the data conversion. If you have a large Top Producer Desktop database, this may take a few minutes.
13. When the data conversion is finished, click **Close** in the *Data transmitted successfully* window. It may take a while for your data to be ready to use. You will be emailed when your data can be accessed through Top Producer 7i. You will not be able to login to Top Producer 7i until the conversion is finished.

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**Note:** Now that you have converted your data into Top Producer 7i, you should **NOT** continue to use Top Producer Desktop desktop. If you convert data a second time, the data in your online database will be duplicated.

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14. Once you receive the confirmation email, thoroughly check that your data is in Top Producer 7i to ensure it has been correctly imported.
15. Ensure that you have a Top Producer for Palm license for the database you have imported your data into.
16. Uninstall TPP from the handheld:
  - tap the “**House**”  icon on the handheld to view the *Applications* menu.
  - tap on the far left corner of the screen and select **Delete**.

- tap **TPP** and select **Delete**.
- tap **Yes** in the *Delete application* message box. TPP is deleted from the handheld.
- tap **Done**.
- place your handheld in its cradle and press the **HotSync** button

17. Uninstall TPP from your Master desktop computer:
  - From the Master computer, click the **Start** button and point to **Programs**.
  - Select **Top Producer for Palm Computing Connected Organizers** and then click **Uninstall**.
  - At the *Uninstall Top Producer for Palm Computing Connected Organizers* screen, click **Yes**.
  - If prompted to *Remove shared components?* click **No to all**.
18. Install Top Producer for Palm on the handheld, following the instructions in ["Downloading And Installing from Top Producer 7i" on page 18](#). If you have already downloaded the client software, click **Start, Programs, Top Producer for Palm, Install Tool**, and follow the instructions.
19. When you synchronize with Top Producer 7i for the first time, your old data will have been imported into new Top Producer for Palm.