Mastering Top Producer

Presented by:

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Certified Top Producer Instructor

Brad Andersohn
Mastering Top Producer

Brad Andersohn is an Experienced Speaker, Bay Area Trainer, and Author. He has been involved in real estate since 1986. He speaks and trains from the "agent in the field" point of view. His focus is Customer Service and Technology. Brad has spent the last 18 years developing automated processes to streamline the Real Estate business. Brads marketing ideas and communication skills have built him the reputation of being, *"The One to call!"* He is a Certified Instructor for Top Producer. The #1 recommended trainer in the Bay Area! If you would like to have Brad Andersohn speak at your next company meeting or function, please feel free to contact him.

Technology will not replace a good agent, but
A good agent with technology will!

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Module 1

Adding Assistants

1. Click File

2. Select Login…
3. In the Name field, click the down arrow
4. Select Administrator
5. Click OK
6. Click: New User
7. Click radio button for assistant
8. Use tab key to advance
   To create a new agent user, click the radio button agent. Only used on multi-agent or network machines
9. Click OK
10. Select a user
11. Click: Create Database
12. Name it: "Farm Area"
13. Click the newly created database
14. Select from "All Users" who will have access to it
15. Click arrows to move to "Users That Have Access"

The Menu Bar

1. Click: File
2. Look at the drop down menus
   Slide mouse across the menu bar
3. Click: File
4. Click: Listings
5. Click: Create New Listing
   Or hold alt key down and hit the underlined letter in the menu

The Tool Bar

1. The tool bar is a shortcut to the menu
2. You could go to the menu bar and
   A. Click: Schedule
   B. Click: Today's Business
   -OR-
3. Click: "Today's Business" icon
   "Today's Appointments" Icon
   "Today's To Do" icon
   "Today's Calls" icon
   "Today's Reports" icon
   "Today's Letters" icon
   "Today's Postcards" icon
   etc.
4. (Change date to show calls)
5. Click: Print List, View, Mark Done
6. Click: View
7. Click: Next Call Date
8. Look At: "Repeat Call Every"

Title Bars and Instructions

1. Close out all open programs
2. Click: Detail Contact Entry
3. Tab through the fields and notice the instructions changing
4. Click: Name
   Add family members, proper salutations, etc.

Customize Tool Bar

1. Click: Setup
2. Click: Toolbars Setup
3. Click: category of choice, i.e. "Financials"
4. Click and drag to the tool bar

Backup / Restore

1. Click: Setup
2. Click: Backup / restore
3. Click: Options
4. Full format double-density
5. Click: Apply
6. Click: Backup
7. Proceed (not needed here)

Use a zip drive or plan to use lots of disks!

Agent Setup

1. Click: Setup
2. Click: Agent Setup
3. Type in first name
4. Use "tab" key to advance
5. Title? Could use Realtor, Broker, Sales Associate
6. No need to hyphen phone numbers
7. Internet addresses - when instructed to do so, Top Producer will access e-mail and internet
8. Disclaimer

Agent Setup

1. For agent photo, click “Browse”
2. Is the photo on Top Producer? Is it external on their computer or is it on a floppy?
3. Click: External
4. Click: Drive to access where the photo is located C? A? D?
5. Click: Browse (under company logo)
6. Click: Internal
7. Click on a logo under picture name
8. Click: Use Picture
9. Click: OK
10. In agent setup, International, U.S.
11. In system defaults, check all buttons except "print in 100 item batches"

* 6i Additional Agent Setup Tabs

There are three new tabs in Agent Setup in System 6i

There are 3 new tabs on the Agent setup. They are Web connections, Fax, and Web publish.

* 6i Web Connections

1. Click Web connections
2. In the News Flash dialog box you can choose how many articles and tips can be stored for you to see.
3. Check or uncheck the box to receive news flash at the startup of Top producer. If you check it, Top producer will automatically dial into the Internet and start retrieving articles and news for you.
4. Lead management websites. If you have an I-LEAD account with realtor.com, you can have your leads from your online listing enquiries directly routed to you here in Top Producer. Each lead as it is brought into Top Producer, creates a contact record right in Top Producer. From here you can do the same thing to this lead for follow up as you do anyone else. You can assign follow up calls and even attach action plans!
5. Your Web site must be LTS (Lead Transmission Standard) compliant. Realtor.com is LTS compliant. You just have to activate this feature.

6. If realtor.com isn't showing at this time…
7. Click Add New.
8. Click on Realtor.com   tpleads.realtor.com
9. Click Select, then click on realtor.com, and click Sign up.

10. If realtor.com already shows up, click on it, and then click Sign up.

11. Your computer will dial into the Internet and go to realtor.com
12. Follow the on screen directions.
13. You will need to know your MLS number and password.
14. You will now be given and Agent ID and Password, write it down!

15. Now click on Realtor.com and click on the Settings button.
15. Enter your Agent ID and Password.
16. Click on the Activate button.
17. Check the box that is labeled Receive leads at startup to automatically receive your leads when you turn your system on.

* 6i Fax

1. Click the Fax tab.
2. You can choose the style of cover pages you use by reviewing and choosing from the Cover page preview menu.
3. Place an “x” in each you would like to include.
4. Type in a disclaimer in the Disclaimer field area.
5. If you want to use an alternative fax program that you have installed on your computer, click the box next to Use alternate fax software.

* 6i Web publish

1. With 6i you can publish Listing Presentations, Buyer Presentations, Flyers, Service Reports, and Feature sheets to a Web site and then e-mail the link to the site where it is stored to your contact.

2. By selecting Upload files to Realty-wire.com, you don’t need a Web site of your own. They create a spot on this Web site for your things. This service costs only $7.95 a month. Compare this to having to pay $40 a month just have a site hosted if you don’t use a free site for hosting your Web site. To enable this service, click the Sign up button and follow through the prompts.

3. Select the button Upload files to an FTP site, if you have your own Web page. You will have to know your URL, FTP address, Username, and upload path.

4. The Save files locally is another fine new option. If you have a company controlled Web site, you can store your things here and then have the Web master for the site upload your files onto the Internet for you. You will need the URL and Folder name for where your files will be stored.

* 6i News Flash

1. This new feature, News Flash, can be accessed by clicking on the New Flash button in today’s business or by clicking on the icon on the toolbar.
2. You can now click on the lightening bolt Get news button and you will be dialed into the site. You can review your history of News Flashes, toggle back and forth through them, and print them.

* 6i E-Mail Manager Setup

1. You will need to have this setup in order to e-mail any of your contacts. First click on Setup on the menu bar.
2. Click Internet/dialer/modem/e-mail setup command.
3. Click Browse to find your Web browser, if you do not what you use just click on the Use System Default button and your Web browser will pop in here.
4. Under the box entitled Internet Mail, select from the menu in the Mail program dialog box you e-mail program. You should select the Top Producer e-mail if yours is not listed.
5. Click on the tab marked as Email manager.
6. You can have Top Producer check for new messages every few minutes if you like. You can set it for 10 minutes, 15 minutes, whatever.
7. I would also click on the radio buttons Link new message in both of the Incoming and Outgoing email automation areas. Also, click on the radio buttons next to Create new contact. By selecting these radio buttons every time you send an e-mail out or receive an e-mail in, Top Producer will create a contact record for you! Talk about a fast way to build a huge database of e-mails!

Module 2

Using Contact Records

1. Click: "Address Book" icon
2. Click: a letter
3. Double Click: any contact listed
4. You can add/change/delete items by clicking on the buttons
5. Click: Schedule Appointments
6. What do you want to do?
7. Click: Select Action Plan
   You can a. Add an activity
   b. Select a plan
8. Click: Next Call Date
9. Give a reason for the call and when to repeat it

Quick Contact Entry

(Awesome tool!!)

1. Click: Quick Contact Entry
2. Enter the following (use info from Open House Contact)
   a. Bill Drake
   b. #436-5982
   c. Contact Type: Buyer, Listing Prospect
   d. Next Call (hit button)
   e. Contact Notes: met @ open, looking for 2 BR condo
   f. Future Property: min $165,000 to $200,000
   g. House Type: condo, townhome
3. Click the different buttons to see the choices
4. Click: Present Home Notes and Future Home Notes to add comments

*Info can be added in 30-45 seconds!!

Using the "Action Planner"
to automate follow-up

1. Click: Setup
2. Click: Plans Setup
3. Notice the 5 different tabs
4. To view or modify a plan, click on the plan
5. Click: View/Modify

It is highly recommended that you print a plan first to use as notes, then click copy plan and then rename it instead of changing the original master.

Detailed Contact Entry

1. Click: “Detail Contact Entry” icon
2. Type in name
3. What if not married? Click a name field
4. Enter in secondary names
5. Click: Company Name
6. Do you want it to auto pop-up, auto load or manual?
7. Home Phone-add it in or click it
8. E-mail, business phone, web page all are on one pop-up menu if you click a button
9. Click: Contact Type
10. Select as many categories you want by clicking them
11. Click: OK
12. Click: Next Call Date
13. Add a reason
14. Repeat this call? Check it and put how many days to repeat call
15. Add contact notes by clicking anywhere in the white field box area
16. Type in notes. Click: OK
17. Additional properties, e.g. investment properties
18. Check mailing address if you want this second address to be on mail outs
19. Click OK to save this entry

Creating a New Plan

1. Click: Setup
2. Click: Plans Setup
3. Click: Action Plans
4. Click: Seller Action/Plan, copy, rename
5. Select new plan you just named
6. Click: OK
7. Click: View/Modify
8. Click: New Event
9. You will see "Add New Event" screen
10. What do you want to do?
    Make a list, i.e. E-mail to top agents
    E-mail to all past clients
    Just Listed card to agents
    Sign installed
    Call 20 neighbors
    Schedule Open House
    Call seller with feedback
    Just Listed post card to lower price agents
11. Click: Icon of what you want to do
12. Click: Post Card
13. Click: Select Card
14. Select "New Listing" post card
15. Click: Next
16. Select post card
17. Click: Select/Modify
18. Works like MSWord
19. Add picture by clicking "Add Photo" icon
20. Move cursor to where you want photo
21. Merge Photo: No
22. Select Internal or External
23. Address post card, etc.
24. Next, perform event in # days radio buttons
25. Select what happens on Saturdays and Sundays
26. Click: New Event
27. Schedule a call
28. Select Reason, create your own or select a standard reason
29. Perform event in # days—7 days
30. Reminder
31. Drop off?
32. If Event falls on a Saturday/Sunday
33. Click: Enter Next for next event
34. When you click OK and Close you will have a brand new action plan

How to Apply an Action Plan

1. Go to Address Book or you can do this right from a Contact’s record
2. Select Bill Drake
3. Double click Bill Drake
4. Click: Select Action Plan
5. Click: Select Plan
6. Click the plan you want
7. Click: Apply Plan
8. Select date to start the plan

Module 3

Searching for Contact Records

1. Click: File
2. Click: Quick Search
3. You can find contacts by any number of methods
4. Click: Contact Types
5. Click: Realtor
6. Start Search

-OR-

1. Click the magnifying lease to go to Quick Search
2. Enter the field you want to search by
3. Start Search
4. Select who you want
5. View contact and address book appears

-OR-

1. Click: Magnifying Lease
2. Search by contact type
3. Start Search
4. Select All
5. Print report
6. Choose report type
7. Click: OK and it prints

Search by Description

1. Click: File
2. Search by description
3. Notice “Contact Type” is highlighted
4. Click: Show List or Double click category under tab
5. Double click: Contact Type
6. Select buyer
7. Click: Add to Search
8. Click: Present/Future tab
9. In Future Home area double click house type
10. Select “Search for Type” then add to search
    Use shift key or control key to add multiple types of selections
11. Double Click: Price Range
12. Enter amounts and click “Add to Search”
13. Click: Start Search
    You can search by notes you have made
    You can search by dates in your contact databases

Referral Manager

1. Click: File
2. Click: Referral Manager
3. See referral tab
4. Click: Referral Business Summary
5. Click: Top Sources

* 6i Lead Manager

Once you have your Lead Management System setup from the Agent setup fields you can now download and manage your leads right from the Internet and have them placed right into your contact management.

1. Click on File and then the Lead Manager.
2. Click the Receive button to start downloading your leads.
3. Click Close when it is done giving you your leads.
4. Click on a contact and click View. If no changes are made the record will not be saved here.
5. Select a contact record and click Follow up. When Schedule an event pops up, click call. Place a follow up call on this record as soon as possible. If you assign call to this person they will be removed from this list.
6. Select a contact and click on the Action plan button. Now you can apply a plan to this contact. This contact will now be removed from this list.
7. To delete a contact, select the contact and click the Delete button.
8. The Download date can be used to go back and check dates that you missed downloads on.
9. If you want a printed report of your leads, select the contacts, one , some, or all, and click Print list.

Follow-up Circuit

Tracking Leads

(This was the original Top Producer program est. in early 1980's)

1. Click: Address Book
2. Double click the contact you want
3. Click: Follow-up Circuit
4. You will see "Notes"
5. Click: OK
6. Set next contact date or follow-up call date
7. Type in or select a reason
8. Click: OK
9. Click: "Letter" or "Card" icon
10. Select a Letter from Top Producer
11. Select "Thank You" Letter
12. Next, select the letter you want
13. Select "Thank You for visiting my Open House"
14. Click: View/Modify to change it
15. Click: OK
16. Print now or send later?

Address Book

1. Click: "Address Book" icon
2. Contact type box gives you the option of who you want displayed
3. Dog-ear a page (frequently accessed people)
4. Click the dog-ear on the menu bar to display frequently accessed contacts
5. Click: Contact Record to see the full record of a selected contact
6. Click: Referred By/To
7. Add the name of whomever you are referring them to
   "Keep track of referral fees"
   "Select action plans, modify action plans"
   "You can keep tabs on whomever send you the most referrals"
8. Delete a contact by highlighting the name and selecting it
9. Click: Binders
10. Delete contact, yes

Module 4

Mail Library

1. Click: Mail—on menu bar
2. Click: View Change
   There are several types of mailings available
3. View letters by clicking a category
4. Click: General Follow-up
5. Click: Next
6. To view a specific letter select it
7. Click: View/Modify

To modify a letter, make a copy first!! Then you will always have the original. You will always have to select a letter category to put the new modified letter in.

Adding a New Category to Letter Library

1. Click: Mail
2. View/Change Library
3. Click: Add
4. Name your new letter category
   "Experienced Agent Recruits"
5. Click: OK
6. Now you can select a letter from another category i.e., Thank You letters
7. Click: Next
8. Select a letter ("Time on the Phone")
9. Click: Copy
10. Type a name or you can start coding letters
11. Select the category to put it in ("Experienced Recruits")
12. Click: Mail
13. View/Change
14. You will see Experienced Agent Recruits
15. Select and Click: Next
16. Select Letter
17. Modify/Change
18. You can now rewrite this letter
19. Rewrite
20. Click: File
21. Click: Save

Envelope and Label Setup

1. Click: Mail
2. View/Change
3. Click: Envelope
4. Click: Add
5. Type in New Name
6. Click: OK
7. Choose new name
8. Click: Next
9. Click: Add
10. Type in name
11. Click: OK
12. Select envelope size (#10 is standard)
13. Select as default
14. Under "Items" select what you want on the envelope
15. Check out, change font and layout
16. Add pictures by selecting "Picture 1"
17. Click: Load Picture
18. Select Internal/External for logos or house pictures
19. Select the graphic
20. Click: Use Picture
21. Check Stretch Picture
22. Click: Preview—to change layout
23. Move pictures and address around. It works like Word, just click and drag

Labels

1. Click: Labels
2. Click: Add
3. Type in a name
4. Click: OK
5. Select the new name
6. Click: Next
7. Click: Add
8. Type name of Label
9. Click: OK
10. Select a label size and style (look on the box for a number)
11. Choose font
12. Set as default
13. Click: Save

*6i New Label Setup

Now you can print just one label instead of wasting a whole sheet.

1. Click on Mail from the menu bar.
2. Click on View/change mail library.
3. Click on the Label tab.
4. Select the category, General follow-up and then click Next.
5. Select Avery 5160 and then click on View/modify.
6. Now you can click on the Font button and then choose how you want your labels to look. You can change the Font, size, and style. When done click OK.
7. Check the boxes next to anything you want to have on your label.
8. If you are satisfied with your selection, click Save, and then click Close.
9. Now to Print only one address label, open up your address book and just click on the contact you want to have a label printed for. You will not need to open up the contact record.
10. Click on the Send mail to contact icon, it is the one with the envelope and the letter together on the toolbar.
11. The Send follow up label pops up with your contacts information in the window, now just click on the Label tab.
12. If you did not choose Avery 5160 to be your default label you will have to click on the big Select label button.
13. Select General follow up and click next.
14. Select Avery 5160 and click OK.
15. Click the “Select position to begin label printing” button.
16. Choose on the grid where you would like to have the printing to start and click OK.
17. Be sure to select how many labels per contact you would like to have printed. Put in the number one if you just want one. If you want a bunch of your own for return address labels, enter yourself as a contact and then print your own labels.

Sending a Pre-written Letter

1. Bring up a contact record
2. Click: Address Book
3. Select someone
4. Double click on name
5. Click: "Envelope and Letter" icon
6. Send follow-up letter to…
7. Click: Select Letter
8. Choose category, i.e. Thank you letters, thank you for time on the phone
9. Click: OK
10. Click: View—to see the letter
11. Click: Edit—to change anything
12. Click: File
13. Save
14. Close
15. Print? Print later? (Print Later will go to pending correspondence file in mail menu)
16. Print now, and click OK
17. Click: Envelope **or** label
18. Click: OK

Post Cards

1. Click: Mail
2. View/Change
3. Click: Post cards tab
4. Select post card desired
5. Click: Next
6. Choose New Listing Post Card
7. Click: Next
8. Select Post Card #1
9. Copy, type Just Listed
10. Click: OK
11. Select Newly Created Card
12. View/Modify
13. Now you can work with this like MS Word: change text, click and drag, add a picture

Sending a Post Card

1. Bring up a contact record
2. Click: “Mail” icon
3. Click: “Card” icon
4. Click: Select Card
5. Select New Listing
6. Click: Next
7. Select the Just Listed card desired
8. Click: View—to see it or edit it
   -OR-
9. Click: OK
10. Click: Print Now
11. Send Later
    (What happens when you send later?)

Mass Mailing

1. Click: Mail
2. Click: Mass Mail Out
3. Now who do you want to send a Mass Mail to?
4. Double click: Contact Type
5. Select your group that you would like to mail to
6. Click: Add to Search
7. Click: Start Search
8. Click: Select All
9. Click: Start Mail Out
10. Click: "Letter" icon
11. Click: "Select Letter" bar
12. Select Blank letter, then Next
13. Click: Copy
14. Type in a name for this letter
15. Select category (or else it will go to 12 month action form)
16. Click: O.K.
17. Select your new letter
18. Click: View/Modify
19. Type letter
    - Change fonts
    - Add pictures
    - Add logos
    - You can insert merge fields also
20. When finished writing the letter click: File
21. Click: Exit
22. Click: Yes
23. Click: OK
24. Close
    Make sure the letter is selected in the mass mailing feature
25. Print
26. OK
27. Print envelopes or labels

Module 5

*6i The E-Mail Manager

1. Click on Mail on the menu bar.
2. Click on E-mail Manager, This will open a window that looks like Microsoft Outlook.
3. Click on View in the menu bar.
4. Place a check by anything that you would like to view in this window.
5. Folder bar creates shortcut icons to frequently used commands.
6. The Folder list shows all folders.
7. Message preview allows you to take a little peak at what is in the e-mail.
8. If you wish to add a folder or icon into the Folder bar on the left, just left mouse click and drag, drag it into the Folder bar area and let go. If you want to remove it, right mouse click on it and select the remove from folder bar command.
9. Moving an e-mail: Select the e-mail and click on the folder that is the 2nd from the left (Move), and then select the folder you want to put the e-mail into.

10. Delete an e-mail: Select the e-mail and then click on the X (delete) icon.
11. Reply to an e-mail: Select the e-mail and click on the reply icon, the person with the arrow pointing to the left.
12. Reply to a group of e-mails: Select some or all and click the Reply to all icon (2 people with left arrow).
13. Forward an e-mail: Select the e-mail and click on the forward icon (person with a right arrow).
14. Link an e-mail: You can link an e-mail to a contact in your database by selecting the e-mail and then click the folder with a chain link in it.

*6i Sending An E-Mail From E-Mail Manager

1. Click on the new mail message button.
2. Enter in the recipients e-mail address in the To: field or click the To: button to find the recipient in your database. Select the contact from you database and click the To-> button.'
3. Click OK
4. Fill in your subject and your e-mail message. At this a point you can click Send.
5. If you want to attach a photo to your e-mail, click on the paper clip icon and choose from your folders what you want to send.
6. Click Send when finished.
7. Click on Tools.
8. Click on Send and receive.
9. You can create a new contact in your database if they are not in here already by selecting your contact's e-mail and then click on the file with the lightening bolt in it (Detailed Contact Entry).
10. Now you can fill in the rest of the information on your contact.

Customize a Listing Presentation

1. Click: "Presentations" on the menu bar
2. Click: Presentation Template Editor
3. Notice the green bullets
4. Under layout (lower right) click arrow
5. Select Seller Services Proposal
6. To see other saved Seller Services Templates, click the arrow under "For Presentation Templates"
7. Click: Create New Template
8. Under available pages, select each page you want. You may choose one at a time and click the arrow buttons to move them or hold the "Ctrl" key down and randomly select additional pages
9. Click the arrow keys to use for the new template
10. To edit a page, click "Edit Template Pages" (note the green button again)
11. Select the page ("Agent Resume")
12. Click: Edit
13. Make changes
14. Click: OK

CMA

1. Click: Presentation
2. Click: Create CMA

   -OR-

1. Click: "CMA" Icon on tool bar
2. Create CMA
3. Select the contact to do a CMA for
4. Click: OK
5. Input subject property info
6. Click buttons to view (modify fields) (Rambler Style Home)
7. Click buttons to automatically load template items
8. Modify features
9. Click: Add Pictures
10. Internal/External
11. If on a floppy drive it is in external, Drive a:
    I am going to Internal because I have the picture saved in my contact record already. Otherwise, insert it from a: Drive or c: Drive, wherever the picture is saved.
12. When you are done entering info, click arrow by comparable type in top left.
16. Click: Current Listings and enter data and photos
17. Continue on until all comps are entered

Demo Top Connector

18. Click: Import
19. Fill in info
20. When finished, Click "Dial"
21. Click: Start New
    Top Connector goes to MLS and grabs comps
22. Using down arrow key, I may select the comps I want and then just click "Select" if I want it.
23. Click: Make CMA
24. Top Connector makes the CMA and goes to Subject Property page
25. Click: Price. Click radio buttons of choice
26. Click: Statistics—The best page you could have
27. Click: Chart type
28. Click: Chart source
29. Click: Top Presenter to create a multi media presentation

Adjusting Comparables for Differences

1. Click: "Adjustments" on the comps (lower left)
2. Click: "Add" to add adjusted features
3. Enter amount to use for adjustment and + or -

To Add Comments and Create Sample Flyer Comments

1. Click: Comments, Sample Flyer and Summary
2. Type your comments in the "Seller Services Comment" field
3. Click: Flyer Comment tab
4. Type in flyer comments
5. Click: OK

Printing the CMA

1. Click: View/Edit
2. Choose which presentation you would like to use
3. Click: Select All
4. Click: Edit This Presentation Only
5. Type in your changes. Use the tab key to move between fields
6. Click: Next. This gives you the next slide. This area is where you can type in your personalized 5-week action plan
7. Click: OK
8. Click: Close
9. Click: Price
10. Click how you want the price to be calculated and shown
11. Click: OK
12. Click: View/Edit
13. Click: Select All
14. Click: Print Preview
15. If everything is as you want it, click Print

*6i E-Mail Your CMA

1. When you are finished making or editing your CMA, you can then hit the Send as e-mail button.
2. The next page that pops up is the screen where you choose what gets sent to the client. I would deselect them all and then cherry pick through the pages that you do want to send for sure. If you to send them all, that's fine, it's just going to be a huge file.
3. Click OK.
4. Next, you will select whether to send your CMA as an e-mail attachment or to have it published to the web and have an e-mailed link to the site where they can view it.
5. Select one and click OK.
6. If you choose to send it to the Web site, an e-mail message will pop up when it is done loading with a link to the site where the CMA is sitting. Now you can type in additional text and then hit send. Be sure that the e-mail address of your contact is correct first.
7. If you choose to send the CMA as an attachment, the e-mail message will also show up but this time with your CMA is attached to the e-mail. You can now type in additional text and then hit send.

*6i Saving Your CMA As An Attachment

1. You can now save your CMA on your hard drive also.
2. When finished with your adjustments and your editing on your CMA, click the Save as attach button.
3. The presentation pages are displayed. From here you can click the select all or unselect all button. At this point it may be just fine to save them all because you will be just storing your CMA on your hard drive or to a disk. If you a have a CD-RW you can save the file anywhere on your hard drive and them copy the file onto a CD, which holds up 700 megs of data.
4. Choose the drive letter to save your CMA, choose your file, and click OK. It will now prepare your presentation and save it to your hard drive. Just remember where you put it.
5. If you have a lap top computer, you can actually create a pretty decent presentation using these pages, it looks really great!

Changing Between Color Copier and Black & White In Top Producer

1. Click: File
2. Click: Printer/Fax Setup
3. Click radio button to select between a default printer or specific printer
4. Click arrow to specify printer
5. Choose your color or black & white

Bar Graphs

1. From the “Comparable Entry” screen, click: Statistics
2. Click: Option
3. Click the category you want
4. Drag and Drop to re-order
5. Select Statistics Display options
6. Click: OK
7. Click chart type
8. Click: Chart Source
9. Click: Print

Buyer Presentation

1. Click: Presentations
2. Click: Create Generic Buyer Presentation
3. Select from your list

   -OR-

   Click: New Contact
4. Click: OK
5. Click: Payments button
6. Click down arrow to choose between comparable types
7. Choose interest rate
8. Choose "Amortization" field
9. You can create three different down payment scenarios
10. Enter a figure or a percentage
11. Click: Print
12. Click: Close
13. Once you close out of your presentation it is automatically saved in your Presentation Manager

Module 6

Listing Plans
Setting Up and Creating New Ones

1. Click: Setup
2. Click: Plans Setup
3. Click: "Listing Plans" tab
4. You will see "Listing Plans Default"
5. Print the plan first. Look at it and add to it anything new that you will do or delete what you will not do
6. Copy and rename the plan so that you don't damage your template

Listing Plans
Making a New Plan

1. Click: Create New Plan
2. Type in the new name
3. Click: New Event
4. Select the event to be added
5. Click: To Do
6. Click: "Reason" button to select from the list or modify the list

   -OR-

   Type in the reason
7. Type: Order Sign Installation
8. If you wish to assign an event to an assistant, click the "Assign To:" arrow
9. Set the day
10. Perform x? days after listing date
11. Reminder?
12. Click: Radio buttons under "Move Event To:" to adjust for Saturdays and Sundays
13. Click: Enter Next
14. Keep clicking "Enter Next" until you are done with your whole customized plan
15. Click: OK

Adding/Maintaining a Listing File

1. Click: "For Sale" icon
2. Click: Create New
3. Select a Seller by clicking the "Seller" button
4. Select a plan you want to use
5. Click: OK
6. A new window appears
7. Set the listing date
8. Set the expire date
9. If you change the listing date, click "Calculate Dates" to readjust all Reminders and To Dos
10. Click in the "List Price" field and enter the price
11. Tab, enter commission
12. Tab, enter source of client
13. Click: Property Statistics. Here, you may add statistics, room sizes, bedrooms, baths, etc. You may also add pictures here.
14. Click: OK
15. Click: "Add Activity". Select activity, type reason, change dates, etc.
16. Click: OK
17. Click: Change Activity
18. Make changes
19. If you want to delete an activity click "Delete Activity"

To Review:

20. Click: Contact Record
21. Click on phone number
22. If the property sells, click "Create a Closing"
23. Listing Activities
24. Click on "Notes" tab to add notes
25. Click on "Include/Exclude" tab to include or exclude items. Click "Edit Include" or "Edit Exclude" to add or delete
26. Click: Create Flyer to create a flyer
27. Click: Statistics
28. Click: "Scheduled Reports" to see a list of reports that have been completed

Add or Replace a Listing Plan

1. Go to the "Listing File" screen
2. Click: Select Plan (Lower right)
3. To remove the current plan, select it and click >> arrows
4. To replace a plan, select one from available plans and click << arrows
5. Click: OK

Marking an Activity as "Done" in a Listing Plan

1. Click: "For Sale Sign" icon
2. Select a listing
3. Click: View
4. Select the listing activity
5. Double click the activity and click "Change Activity"
6. Click: Mark Done
7. Click: Yes, I am sure
8. Click "Yes" to add the activity to the service report
9. Click "No" if you don't have anything to add
10. Always add a value to the "Add Item" screen. Everything we do has value!!
11. Click: OK
12. Click: Service Report to access this now, otherwise you can't access any of the fields
13. Click: Report
14. Look at all of the items you can include or exclude
15. Click: Report Text
16. Click: "Colors" tab to change colors
17. Click: OK
18. Click: Print This Report

Listing Marketing Report Plans

"My agent doesn't call me."
"I don't know what he's doing."
"My agent disappeared."

The Marketing Service Report keeps the seller up to date on your efforts to market their home.

Access a Listing Marketing Report

1. Click: Setup
2. Click: Plans Setup
3. Click: Marketing Report Plans
4. Select either “180-day Plan” or “90-day Plan”
5. Click: View/Modify
6. You can double click any of the reports to see what will be printed

Create a Marketing Report Plan

1. Click: Setup
2. Click: Plans Setup
3. Click: Marketing Report Plans
4. Click: Create New Plan
5. Type in a new name (The Best Marketing Report)
6. Click: OK
7. The View/Modify screen will come up
8. Click: Add
9. In the report name window type “First Report – Best Marketing Report”
10. Do you want to assign it to anyone?
11. Select how many days after the previous report you want it to print
12. Choose “Periodic” or “Cumulative” by clicking on one of the radio buttons
13. Click inside the “Report Introductory and Summary” boxes to add your personalized comments
14. By clicking the “Library” button you may create a standard introduction and summary and save them for future use
15. Click: OK
16. Click: Add to continue adding to your report
17. Type in “Second Report–Best Marketing Plan”, 7 days after previous, “Periodic” or “Cumulative”
18. Click: OK when finished

Applying a Listing Marketing Report Plan

1. Click: “For Sale” icon
2. Select the listing
3. Click: View
4. Click: Automatic Report
5. Select the plan you want
6. Click: Apply Plan
7. It is then inserted onto the listing

Viewing Current Listings

1. Click: “For Sale” icon
2. Select the listing you want to view
3. Click: View

    -OR-

4. Click: Select All to view them all
5. Click: View
6. Click: Next or Previous to toggle between listings

    -OR-

7. To see a number of listings but not all of them, select one and hold down the control key. Left mouse click each listing you want to see
8. Click: View
9. Click: Next or Previous to toggle between these listings

Check out “Today’s Business”. All activities that are not completed will appear as a listing activity.

Printing Listing Marketing Service Reports

1. Click: "For Sale" icon
2. Select the listing
3. Click: Report
4. Select "Marketing Report"
5. Click: Report
6. Click: Print This Report
   In addition:
7. You may want to click "Report Option" to review what you want included or excluded
8. Click: OK when finished with "Report Text" tab and "Color" tab
9. Click: Print This Report

Setting Up Closing Activity Plans

1. Click: Setup
2. Click: Plans Setup
3. Click: Closing Plans tab
4. Print this plan first and review it
5. Copy and rename this plan so you do not mess up this template
6. Click: Copy, create a new name
7. Click: OK
8. Click: Close

Creating a New Closing Activity Plan

1. Click: Setup
2. Click: Plans Setup
3. Click: Closing Plans tab
4. Click: Create a New Plan
5. Give your new plan a name
6. Click: OK
7. The View/Modify screen comes up
8. Click: New Event
9. Select the Event, Call, To Do, Letter, Email, etc
10. Click: Reason
11. Click: Modify to add items to your pick list
12. Assign or delegate it to an assistant by clicking on the "Assign To" down arrow
13. Decide when you want to perform this event
14. Check if you want the event
15. Click: Enter Next to keep adding events
16. Click: OK when finished with all events

Viewing or Modifying a Closing Plan

1. Click: Setup
2. Click: Plans Setup
3. Click: Closing Plans
4. Select the plan to view and click “View” or “Modify” or just double click the plan
5. To modify, select the event to be modified
6. Click: Modify Event
7. Make your changes
8. Click: OK

Creating a Closing

1. Open a contact’s record by clicking the “Address Book” icon
2. Select your client/customer name and double click
3. Click: File
4. Select “Closings”
5. Select “Create New Closing” and click
6. Your contact record information is inputted already
7. Select weather your contact is a Buyer or Seller
8. Click: Buyer (on left)
9. Choose your buyer if it is on your database or click “New Contact” to add someone
10. Select a closing plan by clicking “Closing Plan” or by selecting the plan and click OK
11. If you click “Closing Plan” you will then select the plan you want and then click “Apply Plan”
12. Click: OK

Adding a Closing Activity

1. From the closing for your contact click “Add Activity”
2. Select the Event
3. Click “Reason” or type in your reason
4. You can now select a specific date
5. Select your reminder

Changing an Activity

6. Click: Change Activity
7. Make your changes
8. Click: OK

Delete Activity

9. Select the item to be deleted
10. Click: Delete Activity
    If you make any changes to the acceptance date, closing date or possession date click “Calculate Dates”
11. Input the missing information
12. Click: Property Statistics and fill in data
13. Click: Pictures
14. Click: Add and Find the Photo
15. Select the report and click “Apply Plan”

Closing Parties

1. Click: Closing Parties
2. Click: Add Closing Party
3. Do you have your party in your database? Do you want to add the party to your database?
4. Click: Add Contact to List
5. Click: New to add someone new
6. Click OK when done entering your contact
7. Select the contact and click OK

Setting Up a Closing Report Plan

1. Click: Setup
2. Click: Plans Setup
3. Click: Closing Report Plans
4. Click: Create a New Plan
5. Name it
6. Click: Add
7. Name the report, “Keith’s Report – Letter #1”
8. Select how many days to print report
9. Click: Periodic or Cumulative
10. Click: OK
11. Click: Add
12. Name the report, “Keith’s Report – Letter #2”
13. Select how many days after last report
14. Click: Periodic or Cumulative
15. Click: OK
16. Repeat until all reports entered are named
17. From the “Contacts Closing” record you can choose which plan you want to use by clicking “Automatic Report”
18. Select the plan
19. Click: Apply Plan

Replace/Delete a Closing Plan

1. Click: File
2. Select “Closings”
3. Select “Current Closings”
4. Select the closing to view
5. Click: Select Plan
6. Select the current plan in use
7. You can drag and drop it by holding the left mouse button down or you can select the plan and hit the >> arrows
8. Then select a new plan from the available plans, drag and drop or hit the << arrows
9. Click: OK

View Closing

1. Click: “Sold” icon

View Closing Activities

1. In “Today’s Business”, double click “Closing Activities”

Editing Closing Reports

1. Click: “Sold” icon
2. Select the closing
3. Click: Report
4. Select the report option desired
5. Click: Report
6. Click: Print This Report or edit it by clicking “Report Options”

Printing Closing Reports

1. Click: “Sold” icon
2. Select the closing
3. Click: Report
4. Select the report option desired

Transfer Property

When you have a closing, you can transfer all the information on a seller's property record to the buyer.

You **must** be in the closing screen.

1. Click: "Sold" icon
2. Select the closing record
3. In the "Closing Status" field click the down arrow and select "Closed/Paid"
4. Click: Transfer Property
5. Select the buyer's name
6. Click: Radio for the property type
7. Click: Transfer

Module 7

Scheduler and Reassigning

1. Click: "Calendar" icon
2. Click: "Options" icon (2nd from right)
3. Click: "Preferences" tab
4. Select the items you want to run
5. Click: radio buttons for the scheduler time to be displayed
6. Click: OK
7. From the "Schedule" window, click: "Day" tab
8. Click: Scheduler Option
9. Click: "Reassign" tab
   This allows you to reassign any event(s) for today to your assistant
10. Select the events to be reassigned under "Current Appointment Books"
11. Select the user to be reassigned to
12. Click: Reassign
    Listing Plans, Closing Plans and Action Plans can be reassigned from here also
13. Click: OK
14. Close the scheduler

Scheduling and Adding Activities

1. Click: "Schedule" icon
2. Click: "+" icon (Add Activity)
3. Click: icon of the desired activity
4. Do you wish to assign this to someone?
5. Click: "Assign To" if you are delegating this activity
6. Type in your description or click "Description" to pick from your pick list
7. Select the start time and end time
8. Click: radio button for a one-time event, annual or repeating
9. If you click "Annual" you will see a new list with Birthdays as a reason
10. Click: "Repeating" if you have an event at the same time or day of the week or month
11. Click the link to: "Contact" to link this appointment to someone
12. Click the link to: "Listing" or "Closing" to attach it to a listing or closing
13. Click: OK

Changing Appointment Times and/or Dates

1. Click: "Appointments" icon
2. Click: "Week" tab
3. Using your left mouse, click and hold down a scheduled appointment and drag it to a new day and/or time
4. Click back to day

Viewing Calls, To Do's, Letters, etc.

1. Click: Down Arrow in the middle of your schedule (all may be displayed)
2. Select what you would like to view. You will see completed activities and uncompleted activities
3. Click: Chain Link to view who the activity is linked to
4. Click: "→" on the "Time Description" bar to expand your viewing field

Sending a Letter from Scheduler

1. Click: "Schedule" icon
2. Click: "+" icon (Add activity)
3. Click: "Letter" icon
4. Click: Select Letter
5. Select your letter
6. Click: Next
7. Select your letter
8. Click: OK
9. Click: Mailing Name
10. Click: Modify the List
11. Click: Add New
12. Add Letter name
13. Click: OK
14. Select your name and click OK
15. Click the down arrow next to sheet if you want to sort your mail
17. Set the date of the letter
18. Click the link to: "Contact", "Listing" or "Closing"
19. Click: OK

View/Modify Activities and Marking Them Done

1. Click: "Schedule" icon
2. Double Click the activity from your daily planner
   -OR-
3. Click: "√" icon (Update Activity)
4. Click: Mark Done
5. Add to Service Report?
6. Click: Yes
7. Always assign a value to the service report

To Delete

8. Click: Delete

To Archive the Activity

9. Click: "Archive Activity" icon (4th from the left)
10. Click: Yes

Printing Scheduler Reports

1. Click: "Schedule" icon
2. Click: "Report Options" icon (3rd from right)
3. Select the report you want
4. Select a date range
5. Click: Print

Today's Business

1. Click: "Today's Business" icon
2. If you need to take your list of calls with you, double click "Calls"
3. Click: Select All
4. Click: Print List and make your calls on the road
5. You can preview your To Do list by clicking "To Do's"
6. Click: Select All
7. Click: Print List or View to see them
8. When you Select All you will create a rolodex of all contacts
9. You may select an item and if it is completed, click "Mark Done"

Letters and Post Cards

10. Double Click: Letters
11. Select a letter to view
12. Click: View
13. Click: Edit This Letter if you want to change it
14. Click: File, Exit, Yes to save the letter

Printing the Letters from Today's Business

1. Double Click: Letters
2. Click: Select All
3. Click: Print

Printing Service Reports

1. Double Click: Service Reports
2. Do you want to view any? Select the report and click "View"
3. Do you want to modify it? Click "View/Modify"
4. Otherwise , select the report or click "Select All"
5. Click: Print
6. Click: Yes to mark them as done

Module 8

Adding a Picture to a Contact Record

1. Click: "Camera" icon
2. Select the contact you want or click "New Contact" to add someone
3. Click: OK
4. The "Property" and "Maps" tabs are always linked to the address. The Contact pictures will always be associated to the contact
5. Click: "Property" tab
6. Click: Add, "Picture Border" screen comes up
7. Pick "External" if you have to find the photo and "Internal" if the photo is loaded on Top Producer
8. Do you want previews of the pictures? If yes, check "Show Pictures"
9. Click: "Internal" tab
10. Under Internal, you will see "Picture Name". Select the picture (On graphic)
11. Click: Use Picture

All graphics can be linked with a merge field so that they can be automatically loaded into a flyer or CMA when you use the merge field

Adding More Pictures

1. You can add more pictures to the contact record by clicking "Add"
2. Click: Internal or External
3. Select the picture
4. Click: Use Picture

You can also delete a picture by following through the same steps but click "Delete" instead of "Use Picture"

Using the Flyer Templates

1. Find the contact record you want
2. Click: Address Book or File to search for the contact
3. From the address book, double click the name of the contact
4. From the contact record, click "Property Statistics"
5. You may input a lot of information such as taxes, lot size, square footage and by clicking "Room Dimensions" you can add room size. All of this information will then be saved for this contact record and can be used when flyers are created
6. Close out the screen

New Flyer Category and Copied Templates

1. Click on the category of the flyers to be copied
2. Go to the "Flyer Template Library"
3. Select the flyer you want copied to the new category
4. Hold down "Ctrl" key
5. Click the left mouse
6. Drag the flyer up to your new category and let go of all buttons
7. Click: Yes Okay to copy

Easy Flyer Entry

1. Find your contact by using the "Address Book" or "Quick Search"
2. From the "Address Book", double click your contact
3. Click: "Flyer" icon
4. Select a category
5. Select a flyer from the "Template Library"
6. Click: Easy Flyer Entry
7. Click: Print if that is what you want
   If you wish to edit this flyer, click F3. By doing this, you can toggle Between the flyer and the edit
8. Double click: text box "Hurry"
9. Delete by highlighting the text
10. Click: Delete (on the keyboard)
11. Type your desired text
12. Click: OK

Switching Between Photos

13. Double click the photo. The property's photo will appear
14. Click: the picture then click "Use"

Save the Flyer for Future Use

15. Click: File
16. Click: Save
17. Click: Exit
    This flyer will now be saved for future use

Price Reduction on Existing Flyer

1. Click: Previously Saved Flyer
2. Select the flyer
3. Click: View
4. Click: F3
5. Find where you want to change the price or add the pride to a flyer
6. Click: File, Save when done
7. Click: F3
8. Click: Print

*6i E-Mailing, Faxing, Or Attaching Flyers

1. You can open a contacts record from the address book and then click on the Flyer library icon to open up easy flyer and create a flyer…
2. Or you can just open up the flyer library if you want to just create a flyer like a n agent resume, etc…
3. You can click on any category to find your flyers. Click on the new category entitled, Stop The Presses.
4. Click on the Just Listed flyer.
5. Click on the Select Property button.
6. Choose your contact.
7. Click on Easy Flyer entry.
8. Once everything loads you can do a number of things with this flyer to get it to your contact.
9. Click, Fax, to fax it to your contact.
10. Click on the, Send as email, button and you can choose to send it as an e-mail attachment or publish it to a Web site.
    This will give you a new window with a choice to send it as an e-mail attachment or publish it to the Web. You will need to have set this up in the Agent Setup area in the Setup menu. If you select Publish and e-mail the link, then click OK. You will now notice that your flyer is being uploaded to the Web. Click the To: button on the e-mail screen to find your contact. You will now see a link to your Web site where they can just click the hyperlink in their e-mail and be taken right to the flyer.
    If you select to send it as an e-mail attachment, you e-mail manager window again will pop up with the flyer attached to your e-mail. Now click on the To: button, select your contact and hit send.
11. You can click on, Save as attach, and then save it to your hard drive, or a floppy, and hand it out on a disk.

Income/Expense Tracker

1. Click: “$” icon
2. Add a new folder and click “Add”
3. Type a new folder name
4. What month are you starting?
   Click down arrow and select the month
5. Click: OK
6. Click: Password to protect
7. Type in your password
8. Re-enter password
9. Click: OK

To open a folder, select the folder and click “View”

Adding a New Category

1. Click: Add Category
2. Type in the name of the category such as “Speaking Fee”
3. Click: Income
4. Click: OK
5. Click: Add Category
6. Type in the name “Speaking Fee”
7. Click: Expense
8. Click: Close

Recording Income and Expenses

1. Click: "Income/Expense" icon ($)
2. Select the file to open
3. Click: View
4. Select the Real Estate Income
5. Click: View
6. Click: Add Item
7. Set the date the income was received
8. Type a name in the sub-category such as "Listing Sold"
9. How much? Enter it in the amount field.
   If you have more commission income to enter, click "Enter Next". Otherwise, click OK
10. Select expenses
11. Click: View
12. Click: Add Item
13. Set date
14. Type in a name for the sub-category
15. Type in a description
16. Type in an amount
17. Click: OK
18. Click: Close

Maybe you will have sub-categories such as "Car", descriptions such as "Lease Payment", "Gas", "Oil", "Maintenance" or "Marketing", "Ads", "Opens", "Flyers", etc.

Viewing the Report
Month to date or Yearly

1. Select a report
2. Click: View
3. Lower right hand corner of the report shows the Cumulative Values

From this screen you may add, rename or delete a report

By clicking "Report" you can view any date expense/income and print it. Select what you want to have printed from the radio buttons. Click OK.

-OR-

1. Click: "$" icon
2. Select the report
3. Click: Report
4. Select the date of the report
5. Select which report you want from the radio buttons
6. Click: OK

Printing Expense Reports

1. Click: "$" icon
2. Select the report you want to print
3. Click: Report
4. Select report options and click a radio button
5. Select date range

The detailed report is a complete report showing all categories and sub-categories.
The summary report includes not only the overview but also sub-categories and items.
The month-to-month net income report is similar to the overview report for each month selected in the date range.

Buyer and Seller Net Sheets

1. Click: Financial
2. Click: Buyer Net Sheet
3. Click: Defaults
4. Click: Add Pre-paid Expense
5. Enter a description
6. Enter an amount
7. Click: Add Next Item until done
8. Click: OK
9. Click: Add Closing Cost
10. Enter a description
11. Enter an amount or a percentage
12. Select the percentage to be from the selling price or the mortgage amount
13. Click: Enter Next Item until done
14. Click: OK
15. Click: Close

Creating Buyer/Seller Net Sheets Using a Contact Record

1. Click: Financial
2. Select either "Buyer Net Sheet" or "Seller Net Sheet"
3. Click: New
4. Select your contact
5. Click: OK
6. "Buyer Net Sheet" comes up. Click OK
7. Click: View and Buyers Net Sheet comes up
8. Type in selling price
9. Type in the mortgage amount
10. Type in the loan type
11. Click: Pre-paid Expense
12. Click: Add Pre-paid Expense"
13. Describe the item
14. Input the amount
15. Click: OK when done or Next Item
16. Click: Print

Viewing a Net Sheet

1. Click: Financials
2. Click: Buyer Net Sheet or Seller Net Sheet
3. Double click the contact or click "View"

Amortization Schedules

1. Open the contact record of the person you are creating an amortization schedule for
2. Click: Financial
3. Click: Amortization Schedule
4. Input loan amount
5. Input interest rate
6. Input amortization schedule period
7. Input term in years
8. Click: Display
9. Select the start date and change payment frequency if needed
10. Click: Display Table
11. Click: Print
12. Make sure the contacts name is accurate or change it
13. Click: Print

For Lump Sum Payments

1. Click on any field in the month when there would be a lump sum payment
2. Type in the amount
3. Click: OK

Module 9

Opening Script Manager

1. Click: Setup
2. Click: Script Setup
   The Script Manager comes up with all the scripts that are available
   Before you use any scripts, be sure to personalize them
3. Click: Options
4. Select either home **or** business number to be auto-dialed
5. Do you want "Yes" or "No" to be automatically inserted for responses to your questions? If so, click the box. An "X" will appear. Don't do it for now.
6. Type in your default ending question "Thank You"
7. Set the font size. Keep it as small as comfortable.

Creating a New Script

1. Click: Setup
2. Click: Script Setup
3. Click: Add Script
4. Type in a new name such as "Just Listed"
5. Click: OK
6. In the field under "You Ask", type in "Hi, this is __________. Is this the owner of the home?"
7. Hit: Enter (on your keyboard)
8. Your question is added to the "Question" field
9. In the "First Response" field, type "Yes" if it is the owner
10. In the "Then You Ask" field, type your next response
    Example: "The reason I was calling was that I just listed a home in the area. Do you know anyone who would be interested in living in the area?"
11. Hit: Enter
12. It is then listed in the "Next Question" field
13. It is also appended in the "Question" field
14. Your new response then triggers the second response field to the first question
15. Type "No" if it is not the owner
16. Hit: Enter
17. Then you ask "Is the owner available?" Type this into the field
18. Hit: Enter
19. The third response field is then activated
20. Now you can branch off from here. Under the "Question" field, click the second question, "The reason I was calling…"
21. The question appears in the "You Ask" field, click in the response field
22. Type "Yes" and hit "Enter"
23. Click in the "Then You Ask" field
24. Type in your question, "Would you mind if I called them?"
25. Hit: Enter

TO CONCLUDE THIS SCRIPT:

26. In the field under “Next Question”, click on the last question
27. Click: Follow This Branch. Your question will appear in the “You Ask” field
28. Click in the “Response” field
29. Type “Yes, you can call them.” Then they supply you with the name and phone number and hit “Enter”
30. Click in the “Then You Ask” field
31. Type “Thank You”
32. Click on the second question in the question field. It moves to the “You Ask” field
33. Add a second response by clicking your curser at the end of the question
34. Hit: Enter
35. The second response is activated
36. Type “No” and hit “Enter”. Keep going through the branches of questions until you are done and then type in an ending response or question or the default ending

Testing the Script

1. Click: Setup
2. Click: Script Setup
3. Click: Test Script
4. Hit the down arrow to choose the script
5. Hit the down arrow on the “Start From This Question” field if you want to start somewhere other than the first question
6. Click a response and the screen will advance
7. If it is successful, click “Back” and check on any other responses
8. When you are done, click “Close”. The “Scripts Setup” screen will reappear if you need to make any changes

Using Merge Fields to Personalize

You can customize/personalize your scripts by inputting merge codes

1. In the “You Ask” or “Then You Ask” field, click the primary question
2. Click where you want a merge field inserted such as their name
3. Click: Insert Merge Field
4. Select: {First Name}
5. Click: Insert
6. Click: Insert Merge Field
7. Select: {Last Name}
8. Click: Insert

Running a Script for Canvassing

1. Use “Search by Description” to find a group of contacts such as geographical farm. Click “Select All”, click “View Contacts”
2. Click: Scripts
3. Your scripts will appear
4. In the “Script Name” field, click the down arrow and click on the script you want to use
5. Click: Yes to use it
6. Click: Dial to use the auto-dial feature
7. If contact is made, start reading your questions and click the responses
8. When finished with this contact, click “Dial Next”
9. Was contact made? Yes or No

Exporting/Importing Scripts to and from a Disk Drive

To Export:

1. Click: Setup
2. Click: Scripts Setup
3. Click: “Import/Export Script” tab
4. Click the “Export Script” radio button
5. In the “Available Scripts” field, select your scripts to be exported
6. Click the down arrow in the “Drive” selection and choose the directory
7. Choose the drive to export to
8. Type in a name for this export
9. Click: Export

To Import:

1. Click: “Import Script” radio button
2. Select the directory
3. Select the drive
4. Select the scripts
5. Click: Import

   You can only exchange scripts with another agent in the network version of Top Producer

Mass Updating of Records

1. Click: File
2. Click: Mass Update
3. Select the "Contact Information" tab
4. Select contact type, click "Show List" **or** double click contact type
5. Select the group you wish to mass update
6. Click: Add to Search
7. Click: Start Search
8. Click: Select All
9. Remove anyone you don't want to be changed in any way by selecting them. Hold down the control key and select any others.
10. Click: Mass Update

Notice all the areas that can be changed

11. When entering something in the "Remove" field and the "Replace" field, the "Replace" information will be put in place of all occurrences of the "Remove" field
12. If nothing is entered in the "Replace" field but something is entered in the "Remove" field, it will just be removed
13. If nothing is entered in the "Remove" field but something is entered in the "Replace" field, mass update will add the item to the contact records

Mass Deleting of Records

1. Click: File
2. Click: Mass Delete
3. Double Click: Contact Type
4. Select the contact
5. Click: Add to Search
6. Click: Start Search
7. Click: Select All and select the contacts you don't want to touch
8. Click: Mass Delete
9. Click: OK

Buyer and Seller Matching

1. Find the customer/client you want to match by clicking the address book and selecting the customer
2. Double Click the customer name
3. Click: "Present/Future Home" tab
4. Click: Match Options
5. The left side is the seller and the right side is the buyer
6. By placing a √ in the box (just click it), you would be saying "must match"
7. Entering numbers in the "+/-" field means the match will search above or below that. If you enter "1" in the "Bedroom" field and there are 3 bedrooms attached to the contact, then the search will search for homes with 2-4 bedrooms.
8. Click the down arrows in the "Special Features" box to search for features and √ the box if it is a "must match"
9. Click: OK
10. Click: Match Buyers to find a buyer
11. Click: Match Sellers to find a seller
12. Red checks are items that "must match"
13. Select a property
14. Click: View or Report

Module 10

Data Synchronization Rules Between a Master Computer and a Remote

1. Click: File
2. Click: Database Administration
3. Select the database and the user who has access to the database
4. The 4 radio buttons are:
    a. Don't prompt, use the rules below
    b. Always prompt when there is a change
    c. Only prompt when there is a conflict
    d. Prompt when Remote data has changed
5. For each radio button, you can select the rules:
    Master Wins, Remote Wins, Latest Wins
6. Click: OK if you have the rules setup as you would like them

If your assistant does most of the data entry on the computer, you can set the rules for the Remote Wins when there are any changes or leave it as the Latest Wins.

Checking Out a Database on Disks from a Master to a Remote

1. Click: File
2. Click: Database Administration
3. Click: Check In/Out
4. Click the down arrow in the "Select Remote User" field
5. Select your user
6. Select remote computer

If checking out to disks, a window will appear telling you to insert disks

7. Database Checkout Completed?
8. Click: OK

Receiving the Checked Out Database On Disks from the Master

1. From the remote computer, open Top Producer
2. Click: OK to login
3. Click: File
4. Click: Database Administration
5. Click: Check In/Out
6. Click: Receive
7. Click: OK
8. Insert the last disk
9. Click: OK
10. Now, insert the first disk
11. Click: OK

Receiving the Database on Disks from a Remote

1. Click: File
2. Click: Database Administration
3. Click: Check In/Out
4. Click: "Setup" tab
5. Click: Receive
6. You will be prompted to insert the disks
7. Click: OK

Online Help

1. Click: Help on the menu bar
2. Click: Help Index
3. Click a button on the far left to go to an area

   -OR-

4. Click: F1
5. Click: Index
6. Type in some keywords for your search

Backup Frequently

Create separate backup disks for Monday, Wednesday and Friday backup. Use Monday disk to backup Monday, Wednesday disk for Wednesday, etc. Replace disks every six months with a new set.