

# Top Producer®

## Initial Set-up

Plus, 5 quick & easy steps  
to CRM success



## Initial set up after activation

### 1. Initial login

Once you've received an email from Top Producer® with your *username* and *initial password*, go to **www.topproducer8i.com** and log in. This first login requires you to accept the subscriber agreement and then click *next*.

After the *user information* window opens, enter your *time zone*, *date of birth* and *zip code*. You must also enter a *security question* and *answer*. If you lose your *password*, or want to reset it, you'll need to provide this information.

Top Producer® will then load your info and the *Top Producer® setup* window will appear.

### 2. Top Producer® setup - 5 easy steps

**Step 1: Add your personal/business information** - Enter a complete profile detailing yourself and your company in the provided fields. This information can be automated to appear in selected marketing materials you create.

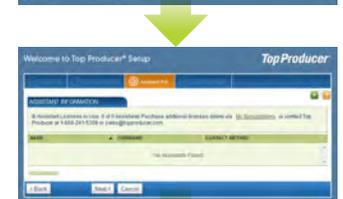
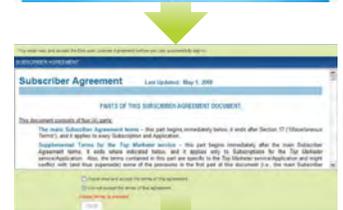
Photos: After adding your agent information, upload a personal photo and logo to complete your brand identity.

**Step 2: Assign MLS access** - If you've secured a Top Connector license in the "Assign MLS access to this user" section, click the dropdown menu and make your selections. Select the MLSs you wish your Top Producer® account to have access to, and also select the MLS data you will be able to leverage with a click.

**Step 3: Assistant info** - Ability to add *assistants* with the purchase of additional licenses.

**Step 4: Sync/data import** - Top Producer® lets you easily sync your contacts and calendar with Google™ or Outlook®.

**Step 5: Save your info** - After you've entered all of your information and optimized your profile options, simply click *done*.



## 5 quick & easy steps to CRM success

### 1. Mobile set up

Once your system is activated on your laptop, login to **m.tpcrm.com** on your touchscreen mobile device and add "home screen" as a shortcut.

Use your Top Producer login on your mobile device to get real time access to your Top Producer® system while on the go.

- 💡 **Tip:** Set up *TEXT ALERTS* to be notified immediately when new leads arrive.
- 💡 **Tip:** Set up *INSTANT LEAD ALERTS* on your smartphone. We text the lead directly to you when they come in. Click the alert and you're already dialing. Visit [www.topproducer.com/campus/top-producer/setup/settings/setup-lead-alerts/](http://www.topproducer.com/campus/top-producer/setup/settings/setup-lead-alerts/) to get this going.

Or give us a **800.830.8300** call and we will be more than happy to help.



Mobile puts your business in the palm of your hand. You're able to respond and record new leads with a few clicks, take notes on the fly, and set-up follow-up calls, to-dos and appointments wherever you go. Plus - gain instant access to your full client and prospect database.

### 2. Contacts

**Keep an updated inventory of all of your contacts and where they are:** Where are they? Outlook, Google™, Yahoo!®, AOL, an old agent desktop program list, ACT? How about the address book on your smartphone? Your social media contacts like LinkedIn®? Sync your Outlook® or Google™ contacts automatically. Export all your contacts from all other locations into an Excel or CSV file and they can easily be imported into your Top Producer® database either via the Top Producer® Import Tool or send a list to our *Technical Support Data Conversion Team* for uploading.

- 💡 **Tip:** Establish your contact types such as "buyer" or "seller" or even "college friend" and you will be able to send out targeted emails, letters, and marketing to very specific groups.
- 💡 **Tip:** Utilize our *NEW sales pipeline* status categories to keep track of where your contacts are in the buying or selling process.



## 5 quick & easy steps to CRM success

### 3. Lead sources/integration

Where are you getting your internet leads from? Realtor.com®? Your company website? We currently integrate with over 50 different real estate online lead providers.

Go to your "settings" on the desktop and in the "contacts" tab, you will find "lead set-up."

Need Help? - Call our customer care team and they will help you set up your lead providers so all leads from compatible sources will flow directly into your sales pipeline.



### 4. Personal follow-up and action plans

Top Producer® CRM will guide you to success each day by surfacing the 5 most important interactions. Follow-up coach intuitively selects 5 contacts a day you need to connect with, making it easier for you to prospect your own database. Do you have longer terms clients in mind? Top Producer® has several pre-written and pre-timed action plans for buyers, sellers and owners. Select the right communication plan or implement your own for these contacts in your database to keep you on task.



### 5. Listings and closings -

Manage all your listings and all your closings, easily in your Top Producer® system and view the data on your mobile device. Use our *listing* or *closing services* checklists or implement your own to stay on track with listing and closing tasks in the order they need to be completed. Import your listing data and photos directly from your MLS with the optional Top Connector license.

Get started by accessing the calendar main menu icon on the desktop and click *plans manager*:

- **Listing plans:** Plans you can apply to listing records as they are designed to prompt you through the process of selling a property
- **Closing plans:** Plans you can apply to closing records which are designed to prompt you through the process of closing a sale
- **Service report plans:** allow you to automate the process of creating reports of listing and closing services



Questions? Call our Top Producer® customer care support team available Monday-Friday 9am-8pm (Eastern Time)

**800.830.8300**