

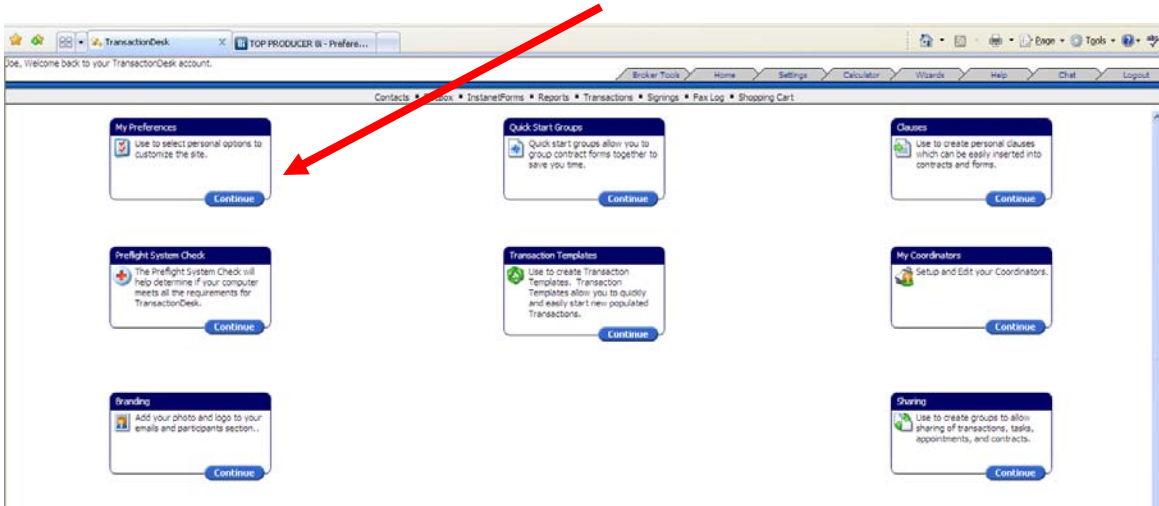
Importing Contacts from Top Producer 8i into InstanetForms and TransactionDesk



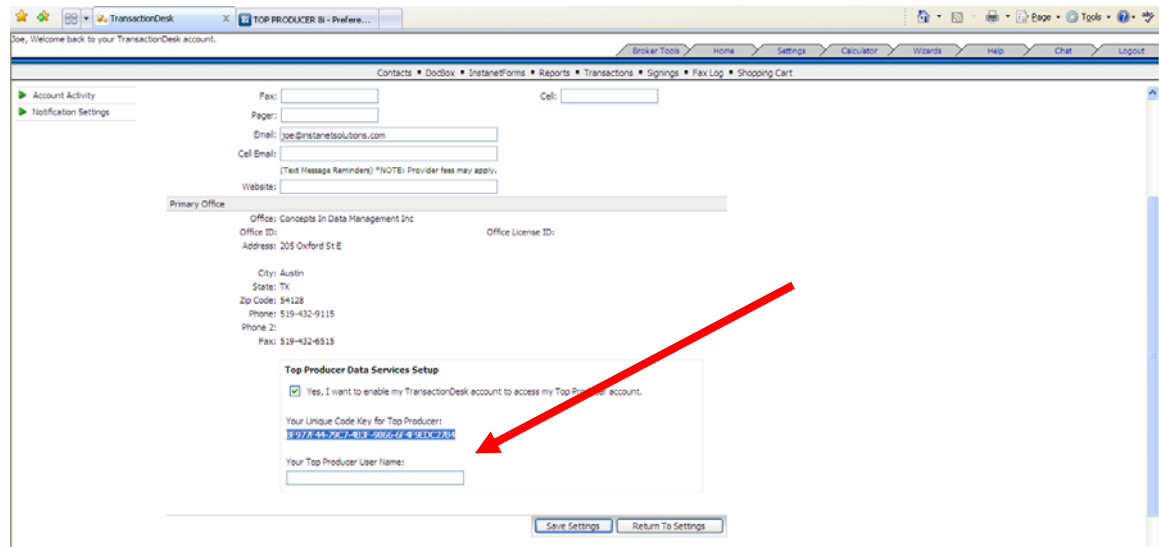
This document provides an over view of the set-up and use of the integration for Importing contacts from Top Producer into Instanet Forms/TransactionDesk

Setup

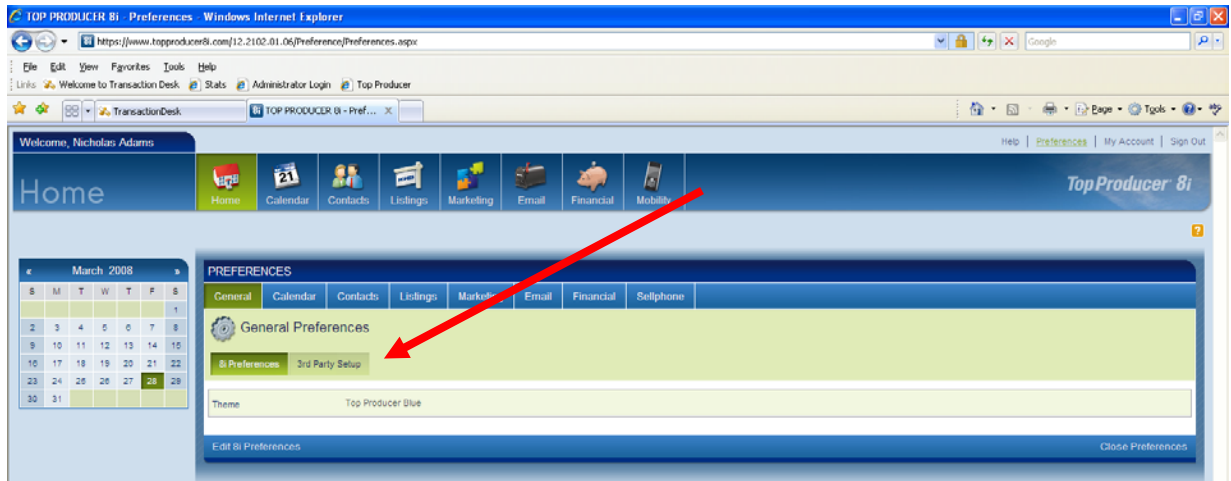
Step 1- Login to InstanetForms/TransactionDesk, click on the 'Settings' tab (near top of the screen) and click on the 'My Preferences' Box.



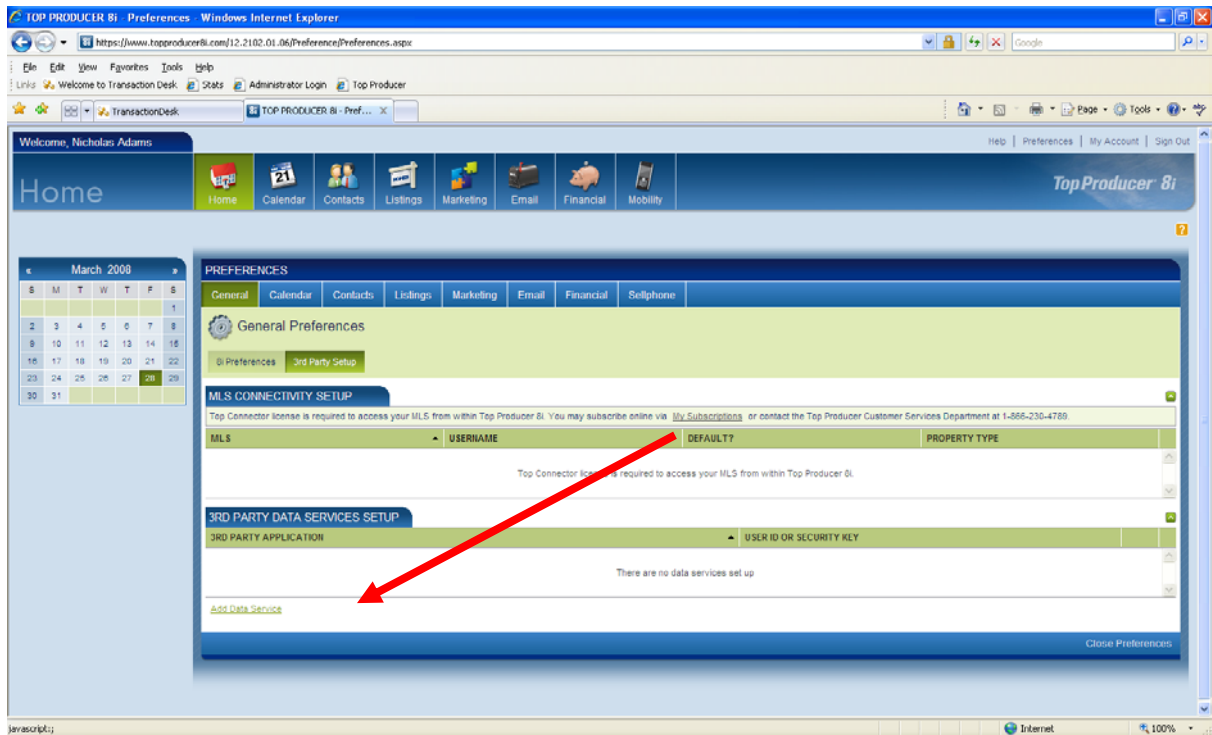
Step 2- Under 'My Preferences' click on 'User Settings' on the left side of the screen and scroll down to the bottom of the page to the 'Top Producer Services Set-up' section. Enter your Top Producer User Name and then copy the code key shown so you can paste it into your Top Producer Account.



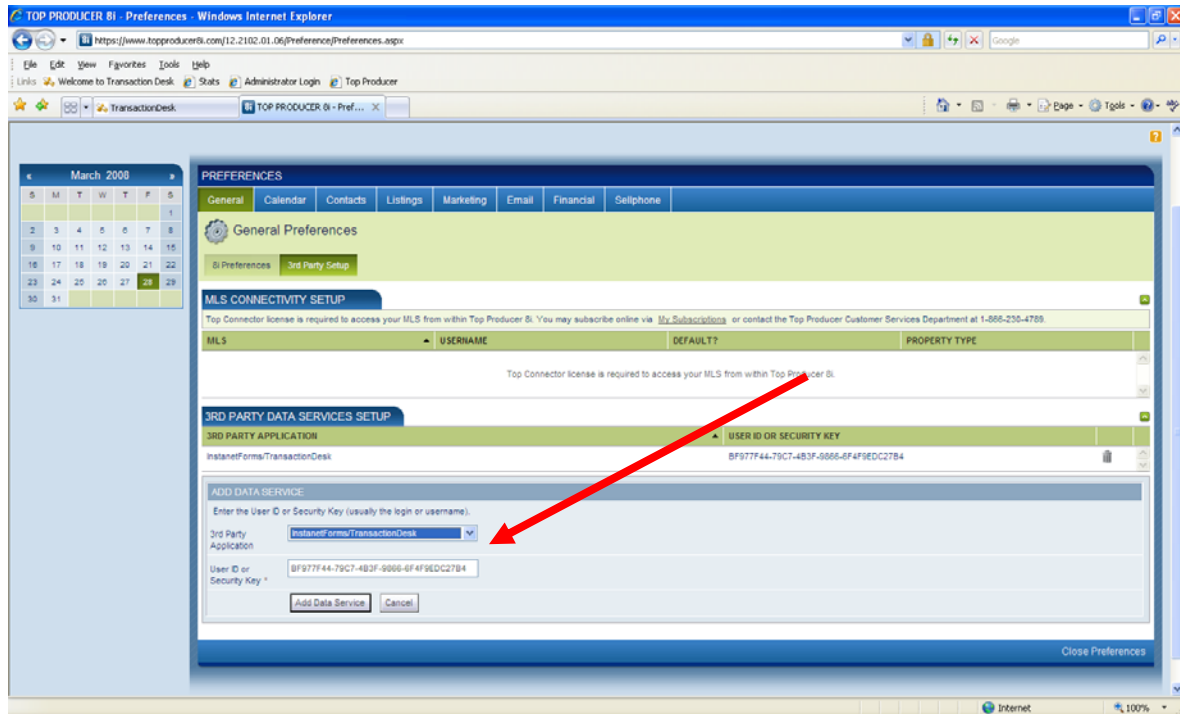
Step 3 – Login to Top producer, Click on ‘Preferences’ (top right of screen), then select ‘3rd Party Services’



Step 4 – Click on ‘Add Data Service’



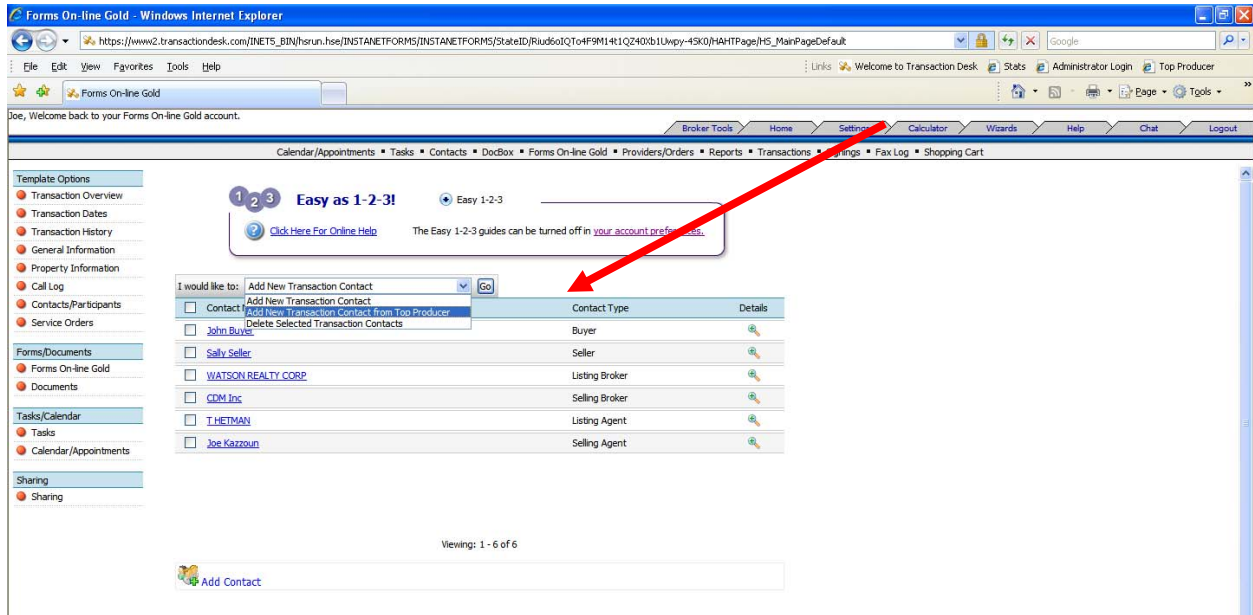
Step 5 - Select InstanetForms/TransactionDesk from the application list and paste in the key code you copied from your TransactionDesk account.



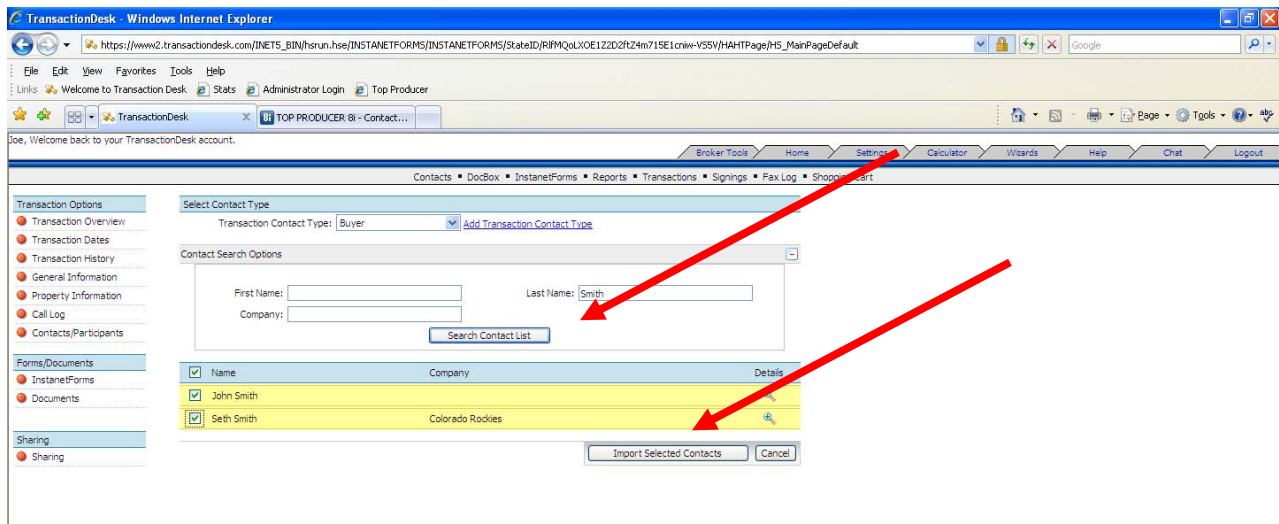
Your InstanetForms/TransactionDesk and Top Producer Accounts are now set-up for the import. The following pages will show you how to import contacts from Top Producer into your InstanetForms or TransactionDesk Account.

Using the Import Feature

Step 6 – To add Contacts/Participants to a transaction file, simply select – I would like to: ‘Add New Transaction Contact from Top Producer. This can also be done at the add Contacts/Participants step in the Transaction Wizard.



Step 7 – When this page appears, only 50 of your contacts will be returned. If you do not see the one you want, simply enter some search parameters and click ‘Search Contact List’. Once the contacts you want are returned, select the one(s) you want and click on the Import Selected Contacts at the bottom of the page. Those contacts are now part of the transaction file. Be sure to select their contact type so they will auto-populate your forms!



Tip: next time you edit the contact(s) in InstanetForms/TransactionDesk, click the checkbox at the bottom of the contact detail screen and they will be added to your permanent contact database in your TransactionDesk account.

