



Importing Contacts from Top Producer into Instanet Forms and TransactionDesk

This document provides an overview 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. Click Continue in the My Preferences box and select User Information from the list on the left side. At the bottom of the page there is a section for “Top Producer Data Services Setup”. Check the box to enable your TransactionDesk account to access my Top Producer account, copy the long alpha-numeric key to paste into Top Producer (in Step 4) and fill in your Top Producer user name. Click the Save Settings button at the bottom when finished.

Account Activity
Provider/Order Settings
Notification Settings

Cell Email:
(Text Message Reminders) *NOTE: Provider fees may apply.
Website:

Primary Office

Office: REALCOMP II LTD. MLS
Office ID: REALCOMP
Address: 28555 ORCHARD LAKE RD.
City: FARMINGTON HILLS
State: MI
Zip Code:
Phone: (248) 553-3003
Phone 2:
Fax: (248) 553-4244

Office License ID:

Top Producer Data Services Setup

Yes, I want to enable my TransactionDesk account to access my Top Producer account.

Your Unique Code Key for Top Producer:
824023A1-4D50-4B93-BBF2-53D8628BDD72

Your Top Producer User Name:

Save Settings Return To Settings

Step 2 – Login to Top Producer, go to Setup and select “Data service setup”

Top Producer 7i

Home | Schedule | Contacts | Search | Mail | Email | Lists | Groups | Flyers | Progressions | Finance | Other | Help

Quick Entry

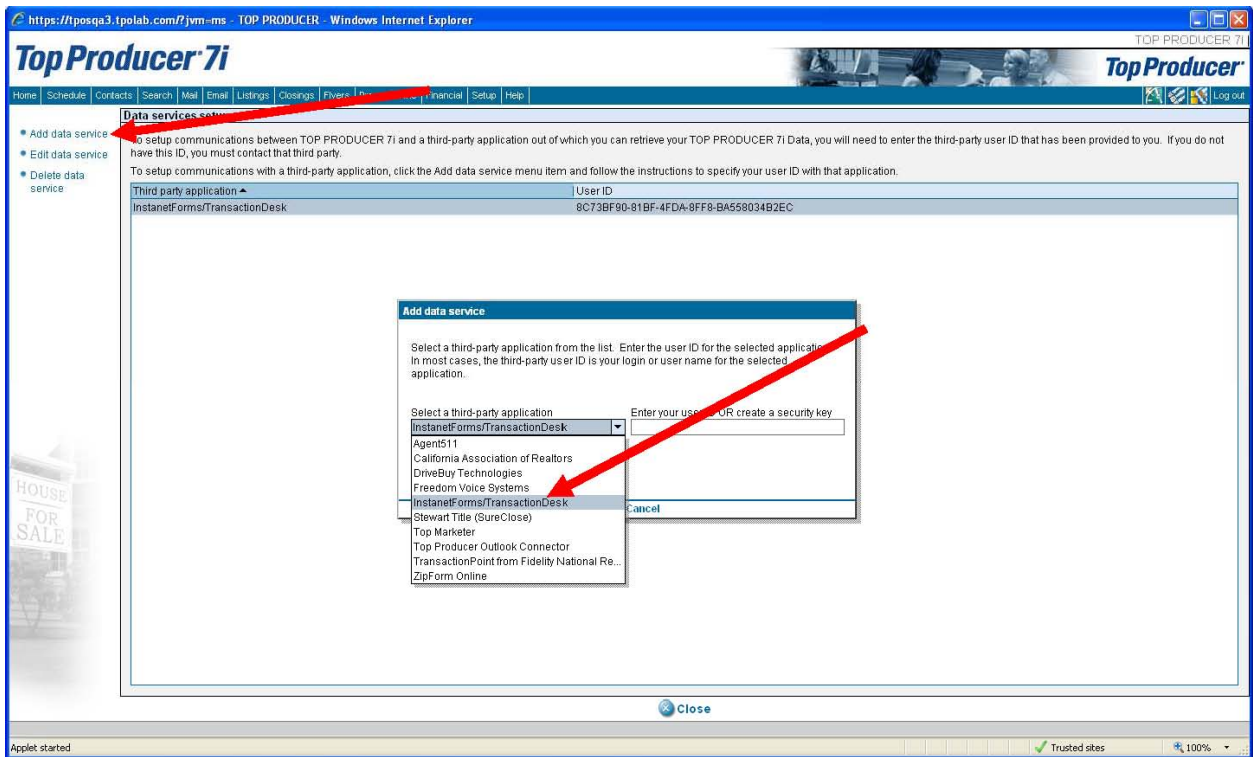
Contact Activity

First name:
Last name:
Contact info: Home
Contact type:
Source:
Note:
Save

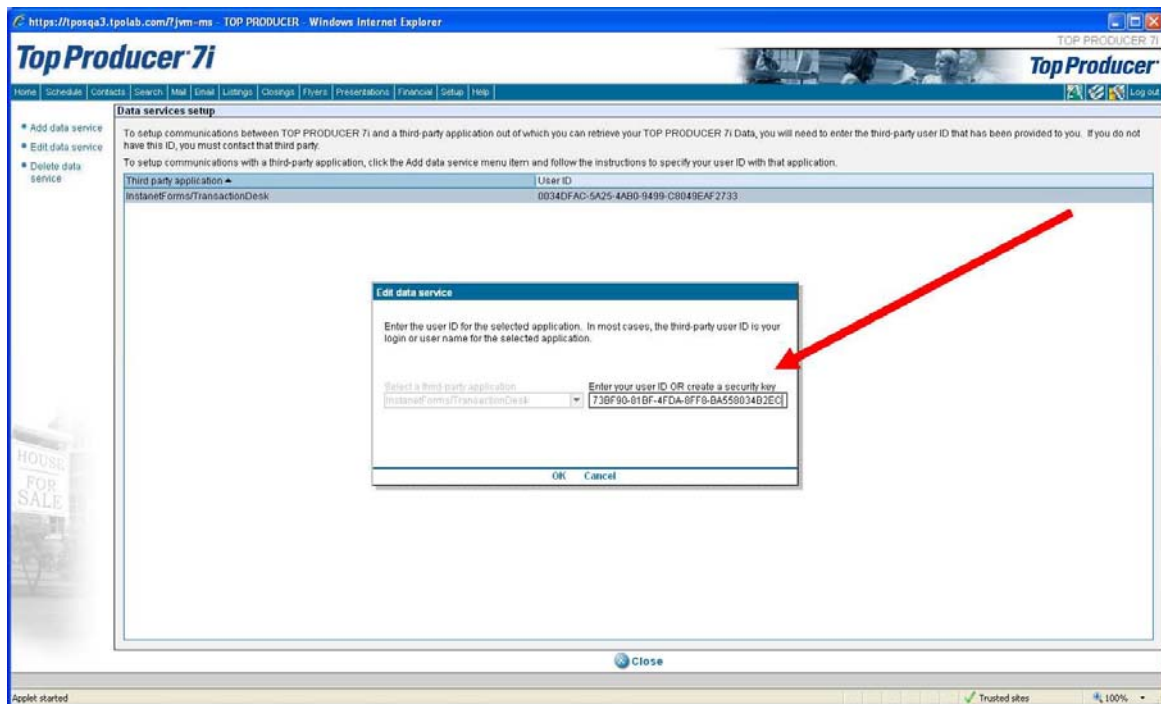
Today's Activities

Time	Description	Contact at	Type	Actions
27				1
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3				8
4				9
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Step 3 – Click on “Add data service” on the left side and select InstanetForms/TransactionDesk from the third-party application list.

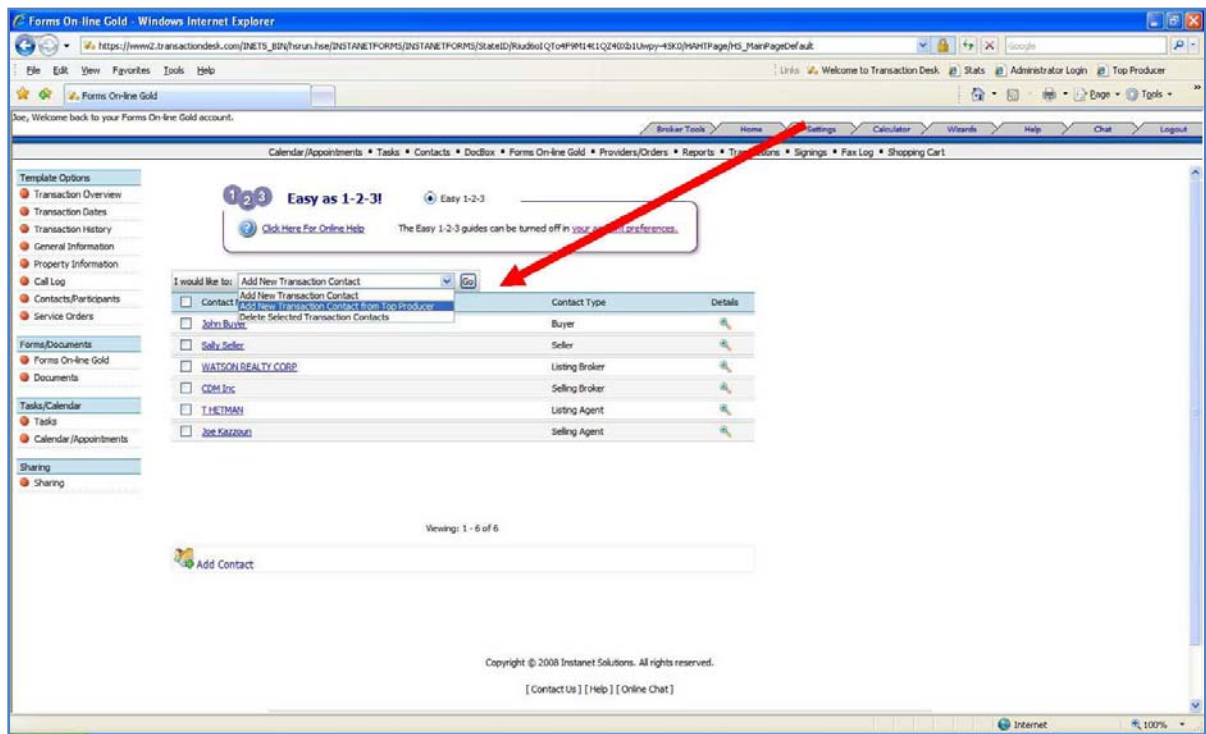


Step 4 – Paste in the code key you copied from your TransactionDesk account in Step 1 into the field that says “Enter your user ID OR create a security key”. Click OK when finished.



Using the Import Feature

Step 6 – Now, whenever you are adding Contacts/Participants to a transaction, simply select “I would like to: Add New Transaction Contact from Top Producer”.



Step 7 – Your Top Producer contacts will appear on the page. Select the desired contacts 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 and then it will auto-populate into your forms!

