
TOPS

UPGRADE GUIDE

Welcome to TOPS iQ! Having used the on-premise, installed version of TOPS Professional previously, you already know all of the great features that are built-in to TOPS, and you’re looking forward to taking advantage of the benefits of using TOPS in the Cloud.

Although many of the features of TOPS Professional and TOPS iQ are functionally similar, there are some differences that come with using TOPS in the cloud. This document is intended to demonstrate those differences, and walk you through the methods to work with TOPS in the cloud.

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IMPORTANT NOTES

- ✓ Did you know you can have other programs installed on your cloud server? Ask your implementation specialist about adding Microsoft Office products to your cloud server!
- ✓ If you use MICR Check Printing with Digital Signatures or MICR Check Scanning, please talk with your implementation specialist about getting these functions set up on your cloud server.
- ✓ In addition to your regular users, you will note that a new user account has been added to your TOPS Users and Passwords. This user (TOPSAUTO) allows your TOPS implementation specialists, and support technicians to gain access to the system. This user is also used to schedule ongoing tasks (such as TOPS file maintenance) that will run automatically even when no other users are logged in to the server. Please DO NOT DELETE this user account – doing so can adversely affect your cloud service.

WHEN TO CONTACT SUPPORT

Your TOPS iQ account is supported by two dedicated teams:

Your **software support** team is TOPS Software. Any time you have a problem with TOPS or need help inside the software, please contact us at 1-800-899-5689 or visit the Customer Care Center at <http://customercare.topssoft.com>.

Cloud server support is provided by our partner, Trapp Online. If you have issues with connectivity, connecting with a printer, you've forgotten your cloud server password, or are having difficulties launching programs on your cloud portal, please contact Trapp Online Tech Support at 1-877-942-2568.

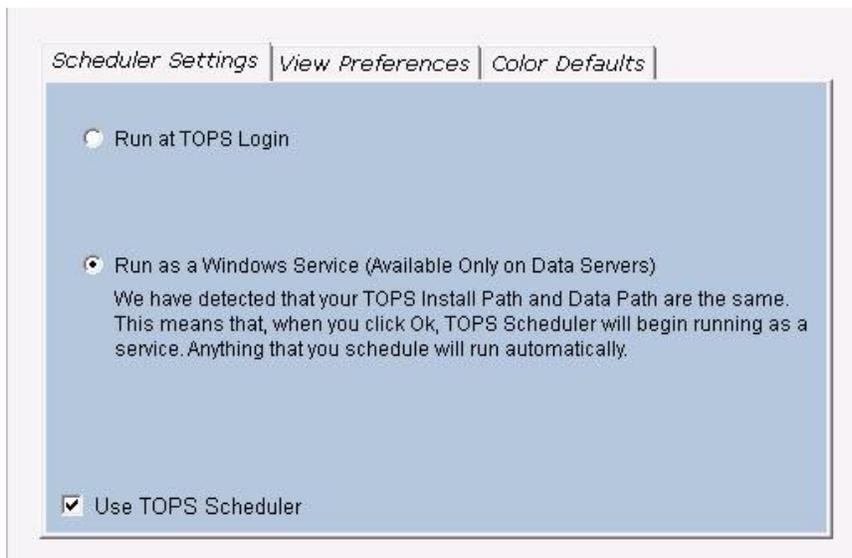


SCHEDULING TASKS IN TOPS IQ

The TOPS Scheduler is accessed via **File>Automation>Schedule Tasks** or through the TOPS Calendar.

CONTROL INFO

The TOPS Calendar Control Info has already been set up so the Scheduler runs as a Windows Service. This allows the TOPS Scheduler to run automatically to insure the scheduler works all hours, even when you are not logged in to the cloud server. Please do not change this setting.



UNIQUE TASK TYPES

When your TOPS iQ account is set up, your implementation specialist will set up the scheduler to automatically perform some maintenance tasks to run after hours on a daily basis.

- ✓ **TOPS File Maintenance**
This function deletes temporary files from within the TOPS folder.
- ✓ **Rebuild Access Data**
This function performs the Rebuild function for all communities, which ensures that the homeowner information remains consistent across all of the TOPS functions.
- ✓ **TOPS Task Manager**
This function looks for TOPS files that may have been left open and closes them automatically.

MANAGING EMAIL IN TOPS IQ

Due to its nature, standard email clients cannot be run in your cloud environment, without also adding Microsoft Office at an additional charge. Therefore, any email functions you wish to use in TOPS iQ will need to be run using the TOPS iMail function. Luckily, your TOPS iQ account comes complete with a TOPS iMail account! You can [learn more about iMail here](#).

MISCELLANEOUS UTILITIES IN TOPS IQ

- ✓ **TOPS Go!**
TOPS Go! is fully integrated with the cloud. Your implementation specialist will help you set up the TOPS Go! Sync to run automatically. Older versions of the TOPS Mobile Manager are not supported in TOPS iQ.
- ✓ **Custom Report Export Utility**
The exported file path listed in the Custom Report Export Utility is the file's location on the cloud drive. In order to access the database, you will need to download it to your local drive. See Uploads & Attachments to learn more about accessing files on the cloud drive.

UPLOADS AND ATTACHMENTS IN TOPS IQ

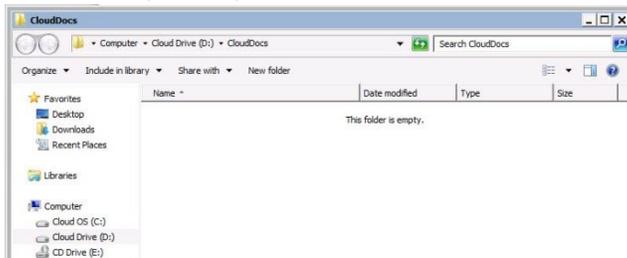
A number of places in TOPS support attaching files and images to your TOPS Data Records, such as Attachments, Work Orders and CC&R. Your cloud server comes complete with a **cloud drive**, which allows you to quickly and easily copy files from your local machine or server to your cloud server.

IMPORTANT NOTE: The cloud drive does not support drag and drop. If you wish to copy files onto your cloud drive, you need to use the Windows Clipboard to transfer files. You can use the keyboard shortcut CTRL+C to copy a file and CTRL+V to paste it. Alternately, you can use the edit menu or the right click menu to access the copy and paste functions.

1. Log in to TOPS iQ. From the launch screen, click to log in to the TOPS Cloud Explorer. You may need to re-enter your Trapp Online login credentials to gain access to the cloud drive.



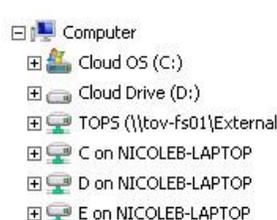
2. The cloud drive displays the last folder you accessed. If there are no documents yet saved to this folder then you may see a blank screen.



3. All of your folders and drives can be found in the menu to the left.
 - a. Your TOPS installation is located on the D:\ drive of the cloud server.



- b. The remainder of the drives listed under Computer are your local drives.



4. To copy files, navigate to the location on your local computer that contains the files you wish to copy. You can do this from inside the cloud drive window, or you can navigate using Windows Explorer on your local machine. In any case, select the files you wish to move to the cloud server and copy them to the Windows clipboard. You can use the keyboard shortcut CTRL+C to copy a file or group of files. Alternately, you can use the edit menu or the right click menu to access the copy function.
5. Once the files are stored in the Windows clipboard, navigate back to the Cloud Drive and select the folder where you want the files to be stored and paste the selected files there. You can use the keyboard shortcut CTRL+V to paste it. Alternately, you can use the edit menu or the right click menu to access the paste function.

INTERFACING WITH 3RD PARTIES USING THE CLOUD DRIVE

If you intend to use portfolio tools in TOPS that interface with a 3rd party, such as Lockbox, Direct Debit, or creating coupon files, please inform your implementation specialist so they can help you set up the necessary folders.

If you wish to do this on your own, you'll need to create a file transfer folder for each feature in the root of your D:\CloudDocs location in your cloud drive. The folder name should be no more than 8 characters in length, and should contain no spaces (ex: D:\CloudDocs\LOCKBOX and D:\CloudDocs\ACH and D:\CloudDocs\COUPONS). These folders should be your primary location to locate and import files you receive from your service provider.

PRINTING IN TOPS IQ

Your Windows default printer will be configured to work with your cloud server when the server is set up. In general, all of your TOPS printing functions will work fine as long as you are printing to the default printer. In this section we will detail the unique printing functions specific to individual modules.

- **Work Orders, WO Costs, Service Requests, CC&R Violations and Architectural Requests**
In order to print to any printer other than the default printer, first select the printer setup, select the printer you want to use, and print to that printer.
- **Pool Pass**
For both reports and printing passes in Pool Pass, click the Printer Setup button and select the printer before continuing the print process.
- **Gate Security**
To print to a printer other than the default printer, go to Report, Printer Setup and select the new printer, then proceed in the printing process.
- **Global Reports**
Print Preview will only support printing to the default printer, however, you can change printers when printing reports by selecting the printer button.